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Research Report

AVERAGE WEEKDAY AND
AVERAGE SUNDAY/WEEKEND NEWSPAPER
COVERAGE OF PRODUCT AND SERVICE USERS
(Total United States and All Metros)

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

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AVERAGE WEEKDAY AND
AVERAGE SUNDAY/WEEKEND NEWSPAPER
COVERAGE OF PRODUCT AND SERVICE USERS
(Total United States and All Metros)

Simmons Market Research Bureau, 1981

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper industry and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

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INTRODUCTION

How to Read the Tables

The tables presented in this report are derived from a special tabulation of the Simmons Market Research Bureau's 1981 Study of Media and Markets.

Each table shows the level of product or service usage for the category described and average single-issue coverage of the daily and Sunday/weekend newspaper among these users, both for the total United States and for all metropolitan areas.

For example, the second line of figures in the first table headed "Alcoholic Beverages: Users of Distilled Spirits and Prepared Drink Mixers" shows that 39.4% of all adults report using whiskey. On an average weekday, the daily newspaper reaches 72% of all these users. On an average weekend, the Sunday or weekend newspaper also reaches 72%. For all Standard Metropolitan Statistical Areas, the average weekday reach of the daily newspaper among whiskey users is 72%, and the average Sunday/weekend reach is 77%.

Additional details on the number of product and service users reached, variations in coverage by level of consumption, etc., are available on request from Newspaper Advertising Bureau.

Making Local Estimates of Product User Coverage

In any market where adult readership figures are available for a particular newspaper or combination of newspapers, these may be used in conjunction with the data presented in this report to obtain estimates of the percentage of local users reached. It should be noted that this is an estimate, since the relationship between newspaper readership and product or service usage may vary from one market to another. However, in the absence of local data on users, this estimate is a reasonable alternative.

National 1981 Simmons figures for average newspaper readership among the total adult population are as follows.

	WEEKDAY		SUNDAY/WEEKEND	
	Total U.S.	All Metros	Total U.S.	All Metros
Total Adults	68%	69%	67%	72%
Total Males	69	71	68	73
Total Females[1]	67	68	65	71

Suppose that an estimate is needed for the percentage of adult whiskey drinkers reached on an average weekday in a metropolitan market by a daily newspaper read by 57% of all adults in the SMSA. The first step is to divide the percent of adult whiskey drinkers reached in all metros (72%) by the percent of total adults reached in all metros (69%). This yields a factor of 1.04. Multiplying this factor by 57% (the adult reach of the newspaper in question) indicates that an approximate estimate of the newspaper's coverage of whiskey drinkers in its SMSA is 59%.

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[1] Coverage figures shown also apply to female homemakers.

ALCOHOLIC BEVERAGES: USERS OF DISTILLED SPIRITS AND PREPARED DRINK MIXERS
(Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Drink any distilled liquor (net)	56.8%	70%	71%	71%	76%
Drink any whiskey (subnet)	39.4	72	72	72	77
Bourbon	20.8	70	71	70	77
Canadian	22.2	72	73	71	76
Rye or blends	12.6	73	73	71	76
Scotch	15.0	73	74	73	77
Drink other distilled liquor (subnet)	49.2	70	71	71	76
Gin	17.8	74	74	73	78
Rum	22.6	69	70	70	76
Tequila	10.9	62	61	67	69
Vodka	28.4	71	72	72	77
Cordials or liqueurs	20.7	73	73	75	78
Brandy or cognac	13.9	73	75	71	77
Prepared mixed drinks with liquor (bottled or canned)	9.8%	65%	66%	65%	72%
Prepared drink mixers without liquor	8.9	70	73	70	77
Bought liquor by the case in last 12 months	2.9	75	77	73	80

ALCOHOLIC BEVERAGES: USERS OF MALT BEVERAGES AND WINES
(Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Drink any malt based beverage (net)	50.9%	69%	70%	69%	75%
Drink any beer (subnet)	49.6	69	70	70	75
Light/low calorie domestic beer (in cans or bottles)	23.4	70	71	70	76
Regular domestic beer (in cans or bottles)	41.7	68	70	69	75
Imported beer (in cans or bottles	15.1	70	71	71	75
Ale (domestic or imported)	7.2	71	73	69	76
Malt liquor	7.5	62	64	61	69
Drink any wine (net)	48.9%	71%	72%	72%	76%
Domestic dinner/table wine	35.9	72	72	73	77
Imported dinner/table wine	21.3	72	73	74	78
Aperitif and specialty wines	5.9	72	75	68	75
Sangria/pop/party wines	14.8	69	70	69	74
Port, sherry & dessert wines	20.3	71	72	72	76
Vermouth	6.1	77	77	73	78
Bought wine by case in last 12 months	4.4	74	77	74	80

MEN'S APPAREL
(Total Males)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Bought in last twelve months:					
One or more overcoats or topcoats	6.4%	71%	70%	71%	78%
One or more raincoats/all weather coats	6.2	73	77	68	77
Any winter or all-year suit	14.0	73	74	75	79
Any lightweight summer suit (dress)	7.6	72	75	74	77
Any leisure/casual suit	3.6	73	75	66	73
Any sport coat or blazer	12.9	81	81	79	81
Any heavyweight jacket	11.2	69	72	70	77
Ski clothes (not boots)	3.1	74	75	77	79
Any leather shoes	36.9	71	72	71	76
Any leather boots	17.9	65	70	68	77
Any lightweight jacket (not suit type)	12.1	73	72	70	77
Any slacks	30.2	72	71	73	78
Any jeans	38.5	67	68	68	74
Any sweaters	14.4	70	71	72	76
Any regular or dress shirt	29.0	70	72	71	77
Any sport shirt	23.8	71	72	73	77
Any tennis clothing	2.7	66	72	69	81
Any warm-up suit	5.5	74	74	70	75
Any swim suit	7.9	71	72	71	77
Any sneakers	19.3	68	69	70	76
Any canvas shoes	8.1	70	68	69	69

MEN'S APPAREL (continued)
(Total Males)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Amount Usually Spent:					
$100 or more for overcoat/ topcoat	3.1%	73%	70%	77%	77%
$50 or more for raincoat/ all weather coat	3.5	78	70	70	75
$100+ for sport coat or blazer	4.6	83	82	80	79
$50+ for heavyweight jacket (not suit type)	5.7	72	75	75	78
$50+ for leather shoes	12.4	72	74	73	78
$40+ for lightweight jacket (not suit type)	12.1	73	84	70	78
$30+ for slacks	7.9	78	75	75	78
$30+ for sweater	3.4	77	74	78	77
$20+ for regular or dress suit	9.1	74	77	70	76
$20+ for sport shirt	6.6	72	72	73	76
$10+ for swim suit	5.0	74	79	70	80

WOMEN'S APPAREL
(Total Females)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Bought in last twelve months:					
Blazer or jacket	23.3%	74%	73%	73%	78%
One or more cloth coats	15.6	72	72	71	75
One or more raincoats/all weather coats	13.6	73	73	73	78
One or more dresses	43.9	69	70	69	75
One or more pants suits	16.0	69	70	68	74
Skirt suit (two-piece)	11.8	74	73	72	78
One or more warm-up suits	7.6	72	70	72	75
Swim suit	18.7	70	71	71	78
Any leather shoes	54.2	69	70	69	75
Leather boots	13.8	69	69	70	75
One or more skirts	27.1	72	72	71	77
Slacks	41.8	72	72	72	77
Jeans	40.9	67	67	69	76
Sweaters	30.4	70	72	72	77
One or more T-shirts	24.7	66	68	68	75
One or more blouses/shirts	50.9	70	70	70	76
Any tennis clothing	2.6	66	66	71	71
Any brassieres	49.8	70	71	69	75
Any girdles	10.7	75	76	70	79
Any slips	21.8	69	70	70	74
Any sneakers	21.0	69	69	68	75
Any canvas shoes	13.1	66	71	68	75
Any sunglasses (non-prescription)	16.7	68	66	70	74
Any regular panty hose	41.4	68	70	68	76
Any control-top panty hose	17.6	72	71	71	77
Any support panty hose	11.2	68	68	68	75
Any regular stockings or hose	5.3	71	75	64	71
Knee-high hose (not socks)	35.4	70	70	69	75
Socks	26.4	68	67	66	73

WOMEN'S APPAREL (continued)
(Total Females)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Amount Usually Spent:					
$75 or more for cloth coat	5.0%	76%	77%	77%	77%
$75+ for raincoat/all weather coat	2.9	79	78	79	82
$50 or more for dress	9.7	75	75	76	78
$35 or more for pants suit	7.7	73	75	71	74
$25 or more for swim suit	5.7	76	77	80	83
$35 or more for leather shoes	16.6	74	74	74	78
$25 or more for skirt	6.8	73	73	76	81
$25 or more for slacks	8.9	73	74	79	81
$25 or more for sweaters	6.8	69	73	73	78
$15 or more for blouse/shirt	22.7	73	72	73	77
$10 or more for slip	8.8	72	73	72	75

HOUSEHOLD APPLIANCES AND DURABLES
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Items owned:					
Separate room air conditioner	26.3%	72%	73%	71%	78%
Separate room heating unit	9.1	70	73	69	77
Automatic washing machine	56.2	70	72	70	77
Separate electric clothes dryer	36.2	72	73	71	79
Separate gas clothes dryer	14.9	72	72	77	78
Electric refrigerator	70.9	70	72	69	76
Separate home freezer	34.2	73	75	68	79
Automatic dishwasher--portable	10.5	72	71	74	78
Automatic dishwasher--built-in	23.7	75	76	77	82
Electric trash compactor	3.2	77	77	77	78
Garbage disposal unit	20.1	75	75	77	80
Electric stove or range	36.8	72	75	71	80
Gas stove or range	30.7	69	71	68	74
Microwave oven in stove or range	2.2	73	74	76	83
Separate microwave oven	13.6	75	75	75	80
Portable room humidifier	12.0	75	74	74	79
Home computer	1.6	75	74	79	83
Sewing machine	46.4	71	72	70	77
Electric toaster oven	24.4	73	73	72	77
Electric toaster (without oven)	60.5	70	71	69	76
Electric mixer (hand held)	53.6	70	70	70	76
Electric juicer	7.3	68	67	70	72
Electric blender	50.8	71	72	71	77
Electric food processor	12.6	77	76	77	81
Pressure cooker	26.2	72	73	69	78
Automatic drip coffee maker	37.5	73	72	73	78
Other electric coffee maker	24.1	74	75	71	79
Electric fry pan	43.0	71	72	70	77
Metal cookware set	34.4	70	69	69	76
Smoke/fire detector	32.1	73	75	75	81
Burglar alarm	4.1	74	74	78	79

PERSONAL APPLIANCES AND DURABLES
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Bought in last twelve months:					
Electric toothbrush	1.9%	69%	71%	71%	75%
Oral irrigator	1.3	75	*	76	*
Bonnet-type hair dryer	2.5	75	71	70	75
Electric hand-held dryer	14.8	69	70	70	76
Electric or battery shaver	5.1	74	77	73	81
Electric hair curler set	4.1	64	77	68	78
Lighted make-up mirror	2.9	70	70	72	76
Hot lather machine	5.5	72	66	70	71
Electric hair-curling iron/wand	9.8	70	69	69	76

*Data not available

AUDIO-VISUAL PRODUCTS
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Owned:					
Number of TV sets:					
One	41.6%	63%	65%	60%	68%
Two	33.1	71	71	70	75
Three or more	18.5	76	76	77	79
Amount spent for TV set:					
Under $100	24.4%	67%	67%	68%	72%
$100-$299	40.7	70	72	68	74
$300-$499	39.1	71	72	71	76
$500 & over	38.8	72	74	70	76
Type of TV set:					
B&W floor model	3.5%	69%	70%	64%	69%
B&W table model	38.2	69	70	69	75
Color floor model	41.4	72	72	69	76
Color table model	53.2	70	71	70	75
Bought a video game in last twelve months	4.4%	71%	72%	73%	82%
CATV (Home wired to cable TV systems)	23.0%	73%	73%	70%	76%
Bought in last twelve months:					
TV set(s) bought or acquired	21.3%	68%	68%	68%	72%
Compact or console stereo	4.0	64	61	69	72
Separate components when purchased:					
Stereo receiver/tuner/amplifier	4.3%	66%	65%	68%	74%
Stereo speaker(s)	4.0	65	64	70	75
Turntable	3.7	68	65	73	75
Cassette deck	3.1	60	60	66	67
Reel-to-reel (player/recorder)	1.3	67	73	71	79
8-track deck (record & play)	2.4	67	59	70	71

AUTOMOBILES
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Have current driver's license	83.6%	69%	70%	68%	74%
Own any cars	82.3	69	70	69	75
Decision Makers for:					
Any car bought new	28.4%	73%	73%	73%	76%
Car bought new in last two years	12.9	75	74	75	79
Domestic car bought new	23.4	74	74	73	78
Foreigh, import bought new	5.8	73	70	76	80

AUTOMOTIVE PRODUCTS AND SERVICES
(Total Adults)

Bought or installed in last twelve months:					
Tires for passenger cars	44.9%	69%	71%	69%	75%
Five or more tires	7.2	71	73	72	78
Four tires	19.3	69	71	69	77
One to three tires	18.4	68	70	68	73
Car batteries	27.0	68	69	67	74
Mufflers	15.8	71	71	69	76
Spark plugs	41.0	68	70	68	73
Shock absorbers	11.2	69	70	69	74
Air filters	48.3	69	71	70	76
Oil filters	53.2	69	71	69	76

AUTOMOTIVE: OIL AND GASOLINE, ANTI-FREEZE, CAR WAX AND POLISH
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Gasoline and diesel fuel usage per week:					
20 or more gallons	29.4%	68%	69%	69%	75%
10 to 19 gallons	32.6	70	72	70	76
9 gallons or less	16.3	69	68	66	73
Buy premium leaded	5.9%	67%	68%	66%	71%
Buy premium unleaded	16.3	70	71	69	73
Buy regular leaded	32.8	67	66	66	72
Buy regular unleaded	38.9	71	73	71	78
Buy gasoline additives	13.3	70	73	67	76
Buy motor oil additives	7.5	67	68	68	73
Buy anti-freeze	60.4	69	70	68	75
Use car wax and polish	42.2	70	70	69	75

BEVERAGES: CARBONATED SOFT DRINKS
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Personally drink:					
Diet or low-calorie cola	30.9%	71%	73%	69%	76%
Regular cola (not diet)	65.6	66	67	66	73
Other diet, calorie carbonated soft drinks:	26.5%	70%	72%	70%	76%
Lemon/lime	15.4	71	71	70	77
Other fruit flavor	4.7	69	70	74	78
Ginger ale	7.5	73	74	70	76
Root beer	11.6	69	71	69	76
Tonic	1.4	77	74	77	84
Other regular carbonated soft drinks:	58.6%	68%	69%	67%	73%
Lemon/lime	37.8	67	68	67	73
Other fruit flavor	18.0	66	67	65	71
Ginger ale	21.1	71	72	70	76
Club soda	6.1	76	78	74	79
Root beer	28.2	67	67	68	74
Tonic	4.6	77	78	76	81

BEVERAGES: COFFEE, TEA, JUICES AND DRINKS
(Female Homemakers)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Use in Household:					
Regular tea	80.7%	68%	69%	66%	73%
Instant tea (unsweetened)	32.6	68	69	67	73
Instant iced tea mix	32.8	69	71	69	76
Ground coffee:	52.9%	70%	70%	68%	73%
Decaffeinated	12.1	72	67	70	65
Regular (not decaffeinated)	42.9	70	71	68	81
Decaffeinated instant or freeze-dried	41.7	69	69	67	74
Regular instant or freeze-dried	40.6	68	69	66	72
Powdered fruit flavored breakfast drinks	23.2%	65%	64%	63%	70%
Powdered soft drinks	48.8	66	66	65	73
Frozen orange juice	69.6	69	69	67	73
Orange juice in bottles, cans or cartons	45.7	66	69	64	73
Tomato and vegetable juices	55.5	70	71	67	74
Other fruit juices and drinks (excluding carbonated and orange juice)	61.4	68	68	67	72

BOOKS, RECORDS AND TAPES
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Bought in last six months:					
Any paperback book	33.3%	71%	71%	72%	76%
Any hard cover book	17.6	73	73	73	78
Any 33 RPM record	21.6	67	67	68	72
Any 45 RPM record	8.5	67	68	63	71
Pre-recorded tape cartridge	10.7	66	65	67	71
Blank tape cartridge	5.9	68	69	70	75
Pre-recorded cassette tape	10.4	70	69	69	74
Blank tape cassette	11.6	70	68	70	74
Belong to any book club	9.6	72	73	70	76

CALCULATORS, TYPEWRITERS
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Bought in last twelve months:					
Pocket or hand-held calculator	14.3%	72%	71%	70%	75%
Bought for self	7.2	71	*	71	*
Bought for someone else	4.1	73	*	72	*
Spent $25 or more	4.7	71	69	68	73
Desk top calculator	2.5	75	74	73	75
Electric portable typewriter	3.5%	73%	72%	78%	77%
Bought for self	1.7	71	*	78	*
Spent $125 or more	2.3	71	71	79	80

*Data not avaiable.

CAMERAS, PROJECTORS
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Own any still camera	64.8%	70%	70%	70%	75%
Bought still camera in last twelve months	15.0	69	70	70	73
Cost of last still camera bought: (in last twelve months)					
Under $20	1.5%	61%	64%	59%	68%
$20-$49	6.8	70	70	70	73
$50-$99	3.4	70	70	71	73
$100 or more	3.9	71	72	73	76
Own any movie camera	15.3%	73%	72%	73%	79%
Movie projector ever bought	7.8	72	66	75	77
Slide projector ever bought	7.3	76	74	78	78

CAMERAS: FILM AND PROCESSING
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Where film processing is done:					
Drug store	27.8%	67%	69%	69%	74%
Camera stor	9.0	74	76	75	78
Mail order	9.5	72	74	70	77
Discount store	12.1	70	69	70	74
Department store	4.8	68	69	68	71
Photo drive-in	14.3	71	70	71	75
Types of film used in last twelve months:					
B/W instant developing: One or more rolls, cartridges	1.6%	67%	67%	60%	67%
Color instant developing: One or more rolls, cartridges	17.4	70	70	69	74
35 mm (BW): One or more rolls, cartridges	3.0	70	70	72	77
35 mm (color slides): Four or more rolls	6.4	75	76	77	82
35 mm (color print): One or more rolls, cartridges	13.0	70	71	73	78
110 Instant load/cartridge BW, one or more	1.8	70	67	71	70
110 Instant load/cartridge color, one or more	21.9	68	69	71	76

FAST FOOD, DRIVE-IN, FAMILY AND STEAK HOUSE RESTAURANTS
(Total Adults)

	Percent of	WEEKDAY		SUNDAY/WEEKEND	
	Total Population	Total U.S.	All Metros	Total U.S.	All Metros
All users	84.2%	68%	69%	67%	74%
Number of Times Past 30 Days:					
Heavy (8 or more times)	21.7%	69%	70%	68%	74%
Medium (4 to 7 times)	32.6	67	68	68	74
Light (3 times or less)	29.9	67	70	65	75
Types Visited:					
Cafeteria	16.5%	70%	69%	69%	72%
Fast food, drive-in	61.6	67	69	68	74
Family restaurant	40.0	70	71	70	76
Steak house	31.9	70	71	72	77
Other restaurants	16.0	67	69	68	74
Chains or Franchises Visited:					
Arby's	15.2%	71%	70%	76%	78%
Bonanza	14.7	69	67	69	72
Burger King	36.1	68	68	69	75
Dairy Queen	18.1	68	70	69	76
Kentucky Fried Chicken	31.0	67	69	68	74
McDonald's	55.6	68	69	69	75
Pizza Hut	22.2	66	67	69	74
Ponderosa Steak House	13.5	74	73	74	79
Wendy's Old Fashioned Hamburgers	25.8	69	68	72	75

FINANCE: BANKING AND INVESTMENTS
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Have checking account at commercial bank	54.4%	70%	70%	70%	76%
Have checking account at savings bank or savings and loan association	17.1	71	72	69	74
Have check guarantee card	8.3	68	69	75	78
Have savings account at commercial bank	29.4	71	72	71	78
Have savings account at savings bank or savings and loan association	26.8	74	75	73	77
Have IRA or Keogh plan	4.6	80	81	77	81
Have Christmas Club	7.5	80	81	73	81
Safe deposit box	19.3	77	78	76	80
Six-month savings certificates or CD's	10.5	76	79	75	82
Personal loan from a bank	12.0	67	69	71	79
Personal loan from a finance company	4.9	64	66	70	74
Auto loan from a bank	9.8	72	71	71	78
Auto loan from an auto dealer	3.0	67	66	68	75
Mortgage from a bank	8.3	73	76	74	81
Mortgage from a savings and loan institution	9.9	76	75	77	81
Mortgage from a finance or loan company	2.2	66	64	73	76
Second mortgage	2.4	70	66	78	80
Gold or gold coins	3.1	75	73	77	76
Silver or silver coins	7.3	73	75	73	79
Vacation or weekend home (owned)	1.9	81	80	75	81
Investment property	4.4	77	73	75	75

FINANCE: CREDIT CARDS*
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Auto rental card	2.3%	77%	75%	82%	82%
Gasoline credit card	22.0	74	74	75	80
Telephone credit card	6.5	75	75	76	81
American Express (green)	3.9	75	77	80	83
Master Card/Mastercharge	22.2	74	75	75	80
Visa (Bankamericard)	24.5	75	74	76	78
Other bank credit cards	2.7	69	70	76	78
J.C. Penney	19.9	74	74	75	80
Montgomery Ward	12.7	73	72	74	78
Sears, Roebuck	30.1	73	73	74	79
Other department store credit cards	24.7	71	76	74	81

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*The following have been omitted because they are held or used by less than 1.0% of the adult population: Air travel cards, American Express (gold), Carte Blanche, Diners Club, hotel credit cards.

FINANCE: INSURANCE
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Have homeowners or personal property insurance	59.7%	72%	73%	71%	78%
Less than $25,000	16.0	65	68	62	70
$25,000-$49,999	19.8	73	73	71	79
$50,000 or more	23.8	76	76	76	81
Have medical, hospital or health insurance	75.7%	70%	71%	69%	75%
Place of work or union	53.6	71	72	71	77
Individual	6.4	68	70	65	74
Have life insurance	61.2%	71%	72%	71%	76%
Less than $10,000	23.5	70	71	69	73
$10,000-$29,999	19.8	71	71	69	77
$30,000 or more	17.7	73	73	75	78
Have life insurance through an agent	21.2%	74%	74%	72%	79%
Have vision care insurance	4.5	73	71	76	78
Have insurance against loss of income	5.6	76	73	71	77
Have dental insurance	12.3	73	72	73	79
Have travel insurance	2.5	76	76	76	84
Have personal liability insurance	6.5	72	71	69	77

FINANCE: SECURITIES
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Own any securities:	24.7%	78%	78%	77%	81%
Under $5,000	11.0	76	77	76	81
$5,000-$24,999	7.8	78	77	77	80
$25,000 or more	6.0	80	83	78	84
Type of securities owned:					
U.S. Savings Bonds	11.8%	78%	77%	78%	82%
Money Market funds	6.1	81	78	79	80
Mutual funds	3.4	82	82	78	82
Common stock in company work for	5.3	80	80	78	83
Common stock in other company	9.1	80	80	80	83
Preferred stock in other company	1.7	81	82	81	87

FOOD: CEREALS, VEGETABLES, RICE, FRUITS, PASTA AND PIZZAS

(Female Homemakers)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Use in Household:					
Any cold cereals:	88.8%	67%	67%	65%	71%
Heavy users (10 portions or more in last seven days)	31.4	70	72	68	75
Medium users (five to nine portions)	32.4	67	67	64	70
Light users (four portions or less)	25.0	63	62	62	68
Any hot cereals	70.2	68	68	65	71
Baked beans (in jars or cans)	66.4	69	70	67	74
Canned or jarred vegetables	82.3	68	69	66	72
Rice	87.5	68	68	66	72
Packaged instant potatoes	41.8	68	67	67	73
Canned spaghetti and macaroni products	36.1	66	68	64	72
Frozen pizzas	48.8	68	69	67	74
Spaghetti sauce (in jars or cans)	57.3	67	68	66	73
Canned or jarred fruits	83.7	68	69	65	72
Fresh Fruits	95.6	67	67	65	71

FOOD: CHEWING GUM, CANDY AND SNACKS

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Total Adults: (Personally Use)					
Chewing gum	61.5%	67%	68%	66%	73%
Regular candy bars and packages	57.3	69	70	68	74
Fun, miniature and snack-size candy bars and packages	37.7	69	71	68	75
Hard roll candy	42.8	69	70	67	74
Female Homemakers: (Use in Household)					
Salted crackers and flavored snack crackers	85.5%	67%	68%	66%	73%
Butter falvored crackers	14.1	70	71	67	73
Other flavored snack crackers	30.8	72	71	71	76
Salted crackers	71.9	67	68	65	73
Potato chips	78.8	67	68	66	73
Corn and tortilla chips and snacks	67.8	67	67	66	72
Pretzels	50.3	71	71	70	77

FOOD: DAIRY PRODUCTS, SPREADS, COOKIES, AND DESSERTS

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
All Adults: (Personally Use)					
Frozen yogurt	14.2%	70%	70%	66%	72%
Yogurt	29.7	69	70	68	73
Female homemakers: (Use in Household)					
Butter	58.3%	67%	69%	66%	72%
Jams and jellies	86.5	67	68	65	72
Peanut butter	87.2	67	68	65	73
Cottage cheese	69.4	70	70	68	73
American/pasteurized process cheese	83.5	67	68	66	73
Natural cheese (other than American)	75.6	69	69	67	73
Spread cheese	31.9	70	71	69	76
Margarine	90.1	67	67	65	71
Ice cream	77.6	68	68	66	73
Ice milk	15.3	64	65	61	68
Cookies (ready-to-eat)	78.6	68	69	66	72
Frozen dessert pies	27.4	70	69	69	74
Frozen cakes	30.5	71	72	70	76
Frozen pastries	21.4	71	71	69	75
Whipped topping (cream type)	71.9	69	69	67	73
Dry cake mixes	76.0	68	69	66	73

FOOD: SOUPS, MEAT, FISH, DRESSINGS AND CONDIMENTS

(Female Homemakers)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Use in household:					
Any dry soup mix or bouillon cubes:	55.5%	70%	70%	69%	75%
Bouillon cubes	36.6	73	72	72	77
Instant soup/broth (add boiling water)	31.9	69	69	69	75
Regular soup/broth (requires cooking)	14.8	69	70	69	77
Canned soup	88.9	68	69	66	73
Frozen main courses (casseroles or entrees)	34.6	68	67	69	74
Frozen complete dinners (TV dinners)	38.9	66	65	66	72
Complete packaged prepared dishes (with macaroni, noodles or spaghetti)	47.3	67	67	67	73
Canned ham	46.2	68	69	66	73
Frankfurters and wieners	83.3	67	68	66	72
Cold cuts (packaged or fresh-cut)	79.2	68	68	66	72
Pork sausages	73.6	68	71	66	72
Canned tuna	87.4	68	68	66	73
Mayonnaise and mayonnaise-type salad dressing	94.0	67	67	65	71
Liquid prepared salad dressing	77.9	68	69	67	73
Dry mix salad dressing	31.8	71	69	70	74
Salad or cooking oil (excluding olive oil)	91.8	68	68	65	72
Bottled barbecue and seasoning sauce	75.1	68	68	66	73
Catsup	92.8	67	68	65	72
Mustard	90.0	68	68	66	73

FOOD: GROCERY EXPENDITURES AND CENTS-OFF COUPONS
(Female Homemakers)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Amount spent in average week:					
$40 or less	31.6%	60%	58%	57%	63%
$41 to $60	29.2	68	68	66	74
$61 or more	39.2	71	72	70	75
Use any cents-off coupons	70.8%	70%	71%	69%	75%
Use cents-off coupons from newspapers	61.3	73	72	72	77

HEALTH CARE PRODUCTS: ORAL HYGIENE PRODUCTS, DEODORANT USERS

(Total Adults Unless Otherwise Specified)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Toothpaste	92.9%	68%	69%	67%	73%
Denture cleansers	21.8	69	71	63	70
Mouthwash	66.7	68	69	66	72
Breath freshener	51.6	68	69	67	73
Deodorant (Males)	46.5	70	71	69	75
Deodorant (Females)	39.7	67	68	67	72
Anti-perspirant (Males)	39.9	70	71	70	75
Anti-perspirant (Females)	53.6	68	68	67	73

OVER-THE-COUNTER REMEDIES

(Total Adults)

Athlete's foot remedies	16.9%	71%	71%	70%	75%
Cold and allergy remedies	64.1	68	69	68	73
Cough syrup	39.7	69	70	66	73
Cough drops	30.7	70	70	67	74
Medicated throat lozenges	50.6	69	70	68	74
Eye drops and eye was (non-Rx)	37.5	67	68	66	72
Headache remedies/pain relievers (non-Rx)	85.1	68	69	67	73
Indigestion aids and upset stomach remedies	59.6	68	69	65	73
Nasal sprays	24.6	69	69	66	72
Pain relieving rubs and liquids	30.7	69	69	65	73
Suntan and sunscreen products	41.8	70	70	71	77
Vitamin capsules/tablets/liquids (non-Rx)	49.6	69	70	68	73

HOME IMPROVEMENTS
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Interior wall paint: Had any rooms painted in last twelve months:	31.3%	71%	72%	72%	77%
Interior wall paint: latex or water base	26.4	72	72	73	77
Interior wall paint: oil base	4.8	68	73	67	76
Exterior house paint and stains: Had outside of house painted last twelve months:	16.8%	71%	72%	72%	79%
Latex or water base paint	9.8	71	72	72	77
Oil base paint	4.6	70	*	72	*
Stain	3.2	70	*	77	*
Have fluorescent lighting fixtures:	43.9%	73%	75%	73%	79%
One	14.6	70	72	69	77
Two-three	18.1	74	76	73	79
Four	11.2	77	76	77	80
Bought in last twelve months:					
Wall paper	12.3%	74%	73%	75%	80%
Wall paneling	5.2	73	73	71	80
Kitchen cabinets	2.7	70	70	66	72
Bathroom plumbing fixtures	8.4	71	73	71	77
Spent $200 or more	2.0	77	76	78	80
Indoor lighting fixtures	7.7	74	74	77	82
Spent $100 or more	2.5	79	80	81	82
Outdoor lighting fixtures	2.8	73	77	74	82
Central air conditioning	2.1	73	77	76	79
Furnace	2.4	77	80	82	87
Garage door opener	2.2	78	75	80	80
Hot water heater	4.5	74	78	73	82
Insulation for ceiling, floor or wall	5.6	75	74	77	82
Roofing	4.7	72	74	68	78
Storm doors or windows	5.7	75	74	76	79

*Data not available

HOUSEHOLD FURNISHINGS: DRAPERIES, CURTAINS, TOWELS, LINENS
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Bought in last year:					
Ready-made draperis/curtains	11.3%	69%	70%	68%	76%
Spent $50 or more	7.4	72	74	71	81
Custom draperies/curtains	4.5	74	73	73	75
Spent $150 or more	3.3	74	73	75	76
Towels	20.8	71	72	70	76
Spent $25 or more	8.9	72	74	75	79
Sheets, pillowcases	23.0	71	72	70	76
Spent $25 or more	12.2	72	74	72	78
Comforters/quilts	9.8	72	71	71	75
Spent $25 or more	7.2	72	73	73	76
Electric blankets	7.0	70	71	67	76
Spent $25 or more	5.4	69	71	67	77
Other blankets	9.8	71	72	68	76
Spent $25 or more	4.6	71	72	68	76
Tablecloths and napkins	13.4	72	73	70	76
Spent $25 or more	4.3	74	73	75	76

FURNITURE, CARPETING AND FLOOR TILE BOUGHT IN LAST YEAR
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Bought living room furniture[1]	12.2%	68%	68%	66%	74%
Spent $500 or more	5.2	67	69	68	74
Bought mattresses (excluding box springs)	13.7	70	70	68	76
Spent $150 or more	6.4	73	74	72	78
Bought beds	11.2	68	67	67	73
Spent $250 or more	4.2	71	73	68	73
Bought other bedroom furniture	9.0	68	67	68	73
Spent $250 or more	4.8	69	73	70	74
Bought dining room furniture	7.7	69	70	68	76
Spent $250 or more	4.7	72	73	72	79
Bought lawn/porch furniture	6.1	71	75	70	80
Spent $50 or more	3.8	74	79	73	83
Bought wall-to-wall carpeting/room-size rugs	11.3	74	74	73	80
Spent $200 or more	2.0	77	76	76	80
Bought indoor-outdoor carpeting	2.5	75	73	75	76
Bought no-wax sheet vinyl flooring	3.5	72	72	74	79
Bought no-wax floor tile	2.7	76	79	76	83

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[1] Other than recliner or sofa bed/convertible.

HOUSEHOLD CLEANERS AND DEODORIZERS
(Female Homemakers)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Scouring pads	86.5%	68%	69%	66%	72%
Scouring powder	87.1	68	68	66	72
Drain cleaners	56.8	69	68	66	72
Oven cleaners	63.1	67	67	64	71
Window cleaners	87.4	68	68	66	72
In-bowl toilet bowl cleaners	53.2	69	68	66	72
Household cleaners (including kitchen and bath)	91.3	68	68	66	72
Floor wax and polish	41.2	68	68	66	72
Rug cleaners	47.8	70	69	66	72
Furniture polish	86.3	68	68	66	72
Air freshener sprays and room deodorizers	70.9	73	68	72	73
Insecticides	62.4	68	68	64	72
Rug deodorizers and fresheners	34.4	68	68	66	72

HOUSEHOLD SUPPLIES: SOAPS, DETERGENTS, PAPER PRODUCTS
(Female Homemakers)

	Percent of	WEEKDAY		SUNDAY/WEEKEND	
	Total Population	Total U.S.	All Metros	Total U.S.	All Metros
Toilet soap	97.5%	67%	67%	65%	71%
Soaps and detergents for regular laundry	96.8	67	67	65	71
Soaps and detergents for fine fabrics	60.1	70	70	67	74
Laundry pre-soaks and pre-cleaners	55.0	69	69	67	74
Bleach	84.5	67	68	65	72
Fabric softeners	71.8	68	68	66	72
Dishwashing liquid (not for automatic dishwashers)	87.4	67	67	65	72
Automatic dishwashing detergent	36.3	73	73	73	78
Facial tissue	87.1	69	69	67	73
Disposable cups	41.8	70	71	67	74
Paper towels	92.4	67	68	65	72
Plastic garbage bags and trash can liners	77.0	68	68	66	73
Plastic sandwich or food bags	68.1	69	69	67	74
Plastic-type kitchen wraps	77.4	69	69	67	73
Aluminum foil	93.7	67	68	65	72

JEWELRY AND LUGGAGE
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Bought in last twelve months:					
Men's new wristwatch (digital face)	9.1%	72%	71%	72%	75%
Women's new wristwatch (digital face)	4.6	72	70	72	76
Men's new wristwatch (dial face)	7.3	71	72	74	77
Women's new wristwatch (dial face)	7.5	72	71	69	75
Women's diamond ring	4.9%	69%	71%	71%	75%
Gold jewelry (not filled or plated)	10.2	71	71	71	75
Other jewelry and gems (not costume)	7.6	70	71	71	76
Luggage or baggage	7.5	72	73	73	79

LEISURE ACTIVITIES
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Participation in last twelve months:					
Indoor gardening and plants	28.7%	71%	71%	70%	76%
Outdoor gardening	33.5	73	74	70	77
Cooking for fun	28.4	69	70	70	75
Adult education courses	7.7	66	66	70	73
Bicycling	16.7	69	69	70	73
Needlework	18.6	69	69	70	73
Woodworking	7.8	69	69	71	77
Painting, drawing, sculpting	8.0	65	66	65	69
Stamp collecting	3.3	69	68	62	69
Coin collecting	4.8	71	72	72	79
Attended movies in last 30 days	31.8	68	70	70	74
Sports Events:					
Watch on TV (Pro football)	44.9%	72%	73%	72%	78%
Attend (Baseball)	15.4	72	79	74	83

PET OWNERSHIP, PET FOOD USAGE
(Female Homemakers)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Own one or more dogs:	38.6%	69%	71%	68%	76%
Canned dog food	19.9	69	73	69	75
Packaged moist dog food	11.7	73	73	71	75
Packaged dry dog food	30.1	68	71	68	77
Dog biscuits or treats	21.6	72	72	72	77
Own one or more cats:	21.4%	68%	68%	67%	73%
Canned cat food	12.1	71	70	71	76
Packaged moist cat food	8.0	72	72	70	79
Packaged dry cat food	16.2	69	69	68	74
Use cat box filler	12.6	70	68	70	75
Use flea and tick care products for dogs and cats	31.9%	69%	70%	69%	74%

POWER EQUIPMENT AND TOOLS
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Items owned:					
Garden tiller	9.3%	72%	77%	64%	78%
Garden tractor	2.5	69	75	66	86
Riding/tractor-type lawn mower	10.3	73	78	71	84
Other power mower (gas/walk-behind)	32.5	74	74	74	80
Other power mower (electric/walk-behind)	4.3	75	73	75	80
Electric drill	34.0	72	73	73	79
Gas chain saw	13.9	71	77	70	80
Electric chain saw	4.3	69	75	68	78
Portable electric circular saw	18.6	73	74	74	81
Portable electric jig/sabre saw	17.4	74	73	74	80
Stationary radial/arm saw	4.5	75	77	74	83
Stationary bench/table circular saw	5.8	75	75	74	82
Stationary jig/sabre saw	3.0	72	73	73	78
Electric sander	19.1	75	74	75	80
Snow blower	7.2	79	81	80	86

PUBLIC ACTIVITIES
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Involved in one or more activities:	68.0%	71%	74%	70%	77%
Voted in federal, state or local election	63.4	72	74	71	78
Wrote to magazine or newspaper editor	14.1	71	74	72	77
Wrote or phoned radio or TV station	16.5	70	71	72	76
Wrote to elected official	16.9	73	75	73	79
Wrote something that was published	10.4	70	75	73	78
Addressed public meeting	15.6	73	77	74	81
Active in local civic issue	14.9	73	78	75	85
Worked for political party or candidate	11.4	74	74	76	78
Fund raising	18.4	73	74	74	81
Worked as non-political volunteer	23.3	73	75	74	81
Memberships					
School or college board	2.9%	73%	70%	72%	74%
Church board	6.2	73	69	67	73
Business clubs	3.1	76	73	78	84
Union	11.0	74	74	74	77
Fraternal orders	6.8	76	77	73	82
Religious clubs	3.2	76	74	70	75
Civic clubs	2.2	87	85	82	88
Veterans clubs	4.2	76	79	74	79
Country club	2.8	78	80	79	83
Health club	5.0	69	68	72	74
A body of local government	1.4	79	78	76	86
Environmentalist organization	1.6	71	71	74	84

OWNERSHIP OF RECREATIONAL ITEMS
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Snowmobile	3.1%	73%	81%	67%	81%
Truck-mounted camper	3.3	64	63	67	74
Towable trailer or camper	3.3	72	73	68	77
Rowboat (not inflatable)	2.7	71	70	68	78
Outboard power boat	5.0	74	74	68	78
Inflatable boat	2.3	74	75	74	81
Other type boat	6.6	69	64	71	69

OWNERSHIP OF SPORTING GOODS
(Total Adults)

Fishing rod--salt water	9.4%	70%	70%	69%	74%
Fishing rod--fresh water	26.6	69	70	69	77
Rifle for hunting	13.9	68	67	68	75
Shotgun for hunting	14.2	69	69	68	79
Target gun	6.1	69	70	71	74
Golf clubs	11.0	77	77	80	84
Tennis Racquet	18.8	70	70	74	78
(Snow) skis	5.1	72	71	74	78
Ski boots	5.0	72	70	76	79
Water skis	3.0	75	71	75	78
Bowling ball	15.1	72	71	75	79
Bicycle	26.3	71	71	72	77
Camping/backpacking equipment	13.9	67	67	70	75
Jogging or running shoes	16.4	70	70	72	77

SPORTS AND OUTDOOR ACTIVITIES
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Participated in last twelve months:					
Bowling	19.6%	69%	70%	71%	76%
Golf	8.2	74	74	79	81
Tennis	10.2	68	69	71	76
Racquet ball	6.1	70	69	72	76
Roller skating	10.5	63	64	65	72
Ice skating	4.9	71	73	70	76
Cross country skiing	2.0	68	69	73	78
Downhill skiing	4.2	71	70	75	78
Water skiing	4.9	69	67	70	75
Swimming	30.9	69	69	69	75
Power boating	6.6	72	74	72	80
Sailing	3.3	70	67	72	75
Fresh water fishing	14.7	67	68	67	77
Salt water fishing	5.3	71	74	71	79
Hunting	7.5	66	68	66	77
Horseback riding	4.4	64	64	66	70
Camping trips	12.4	69	68	72	76
Backpacking or hiking	6.1	66	67	71	75
Jogging or running	11.8	68	69	69	75

SHOPPING, MAIL AND PHONE ORDERS
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Shopped in last three months:					
J.C. Penney	36.1%	71%	71%	69%	76%
K Mart	46.3	69	70	69	75
Woolworth/Woolco	16.9	70	70	70	75
Montgomery Ward	13.5	72	71	73	75
Sears Roebuck and Company	38.2	71	72	71	77
Other department stores	39.0	72	72	71	77
Other discount stores	36.6	68	70	68	75
Ordered in last twelve months:					
Any item by mail or phone	40.9%	70%	70%	68%	75%

TOBACCO: CIGARETTES, DISPOSABLE LIGHTERS, CIGARS AND PIPES
(Total Adults)

	Percent of Total Population	WEEKDAY Total U.S.	WEEKDAY All Metros	SUNDAY/WEEKEND Total U.S.	SUNDAY/WEEKEND All Metros
Smoke cigarettes:	35.9%	65%	67%	65%	71%
Heavy user (30 or more per day)	7.0	67	68	68	74
Medium user (20 to 29 per day)	9.9	65	66	65	69
Light user (19 or less per day)	19.1	65	67	64	70
Smoke filter cigarettes	33.0	64	66	65	70
Smoke non-filter cigarettes	2.8	71	70	71	75
Smoke low tar cigarettes	23.9	65	68	65	71
Menthol filter:	12.9%	65%	68%	64%	69%
100 mm or more	7.1	64	67	63	69
85 mm or less	7.0	66	67	64	70
Non-menthol filter:	23.1%	65%	67%	65%	71%
100 mm or more	11.9	66	66	66	71
85 mm or less	12.9	64	67	63	70
Bought disposable lighters in last twelve months:	33.3%	66%	67%	67%	71%
Males:					
Smoke regular size cigars	10.1%	70%	72%	70%	78%
Smoke cigarillos and little cigars	5.5	69	70	64	72
Smoke pipe tobacco	8.3	68	70	69	75

TOILETRIES: HAIR CARE AND SHAVING PRODUCTS USERS
(Women)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Shampoo	94.1%	67%	67%	65%	71%
Creme hair rinse	52.0	67	67	66	72
Hair conditioners	52.8	67	67	66	73
Hair sprays	53.5	67	68	66	71
Hair coloring	26.9	70	71	69	75
Disposable razors	48.6	68	68	68	74
Electric and batter shavers	14.3	73	75	69	77
Razor blades	37.3	66	66	66	72
Shaving cream or gel	20.9	67	69	66	74
Depilatories	11.6	68	68	66	70

TOILETRIES: HAIR CARE, SHAVING PRODUCTS AND TOILETRIES USERS
(Men)

Shampoo	92.8%	69%	71%	68%	74%
Creme hair rinse	25.0	67	68	66	71
Hair conditioners	24.2	69	68	66	70
Hair sprays	24.4	69	69	69	75
Hair coloring	6.1	70	71	70	77
Disposable razors	36.9	67	70	65	74
Electric and battery shavers	33.0	73	74	73	76
Razor blades	54.2	70	71	69	75
Shaving cream or gel	64.7	69	71	68	75
After-shave lotion and cologne	72.4	69	69	69	75
Hair tonic or dressing	26.0	70	71	68	74
Hand and body cream	14.3	74	73	71	75
Hand and body lotion	33.6	69	72	65	74
Hand and body oil	4.5	69	70	61	71

TOILETRIES: BEAUTY AIDS, COSMETICS AND PERSONAL PRODUCTS USERS
(Females)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
Hand and body cream	33.9%	69%	70%	67%	74%
Hand and body lotion	70.6	67	67	66	72
Hand and body oil	12.8	64	65	63	70
Medicated skin care products	55.3	67	68	66	73
Bath oil and other bath additives	42.9	68	69	65	72
Perfume	48.0	64	65	63	69
Cologne	65.9	69	69	68	73
Toilet water	7.4	69	71	65	73
Face creams and lotions (cleansers)	51.1	68	68	65	72
Facial moisturizers	64.7	69	70	67	74
Blusher	57.7	68	67	67	72
Pressed powder	21.5	69	68	68	73
Loose face powder	20.0	71	72	67	73
Foundation make-up	54.2	69	69	68	74
Nail polish	63.3	68	68	67	73
Eye liner	32.5	68	67	67	72
Mascara	54.9	67	67	68	73
Eye shadow	52.1	68	67	68	73
Lipstick	79.8	69	69	68	73
Pot/jar lip gloss	8.2	63	63	69	70
Roll-on lip gloss	8.0	61	63	61	70
Tube/stick lip gloss	16.7	65	64	64	70
Tampons	35.5	63	64	66	71
Sanitary napkins	43.2	65	65	65	71
Feminine hygiene douches	28.6	65	66	64	72

TRAVEL: DOMESTIC TRAVEL (TRIPS OF 100 MILES OR MORE ONE WAY)

(Total Adults)

	Percent of	WEEKDAY		SUNDAY/WEEKEND	
	Total Population	Total U.S.	All Metros	Total U.S.	All Metros
Took one or more trips last twelve months:	59.0%	70%	70%	71%	76%
One trip	19.4	69	69	67	73
Two-three trips	20.2	72	73	72	78
Four or more trips	19.4	69	69	72	76
Reason for trips:					
Business	8.9%	70%	70%	72%	77%
Vacation	38.0	73	72	73	78
Personal (excluding vacation)	26.3	67	68	67	73
Traveled by scheduled plane	15.4%	74%	73%	75%	79%
Traveled by charter plane	2.7	72	74	70	77
Number of airline round trips:					
One	9.8%	73%	73%	72%	78%
Two-three	4.9	75	74	77	79
Four or more	2.7	75	69	79	73
Used travel agent	8.6%	72%	71%	74%	79%
Stayed at hotel and/or motel	30.8	73	72	74	77
Purchased travelers checks:	14.1%	75%	74%	78%	80%
$600 or more	5.8	78	76	80	80
$300 to $599	5.0	78	76	80	80
less than $300	3.3	64	68	72	78

FOREIGN TRAVEL
(Total Adults)

	Percent of Total Population	WEEKDAY		SUNDAY/WEEKEND	
		Total U.S.	All Metros	Total U.S.	All Metros
One or more trips past three years:	18.5%	72%	72%	73%	77%
One round trip	10.3	72	73	73	76
Two or more round trips	8.2	71	71	74	78
Any business trip	1.5	74	73	76	77
Any vacation trip	14.4	74	75	76	79
Any personal trip (excluding vacation)	2.2	64	63	64	66
Mode of transportation:					
Scheduled plane	10.6%	74%	74%	74%	78%
Charter plane	3.9	76	76	76	78
Cruise ship	1.8	69	66	74	80
Used travel agent	8.7%	76%	76%	76%	78%
Destination:					
Canada	6.1%	72%	72%	75%	80%
Mexico	3.6	64	62	69	71
Hawaii	3.9	76	75	75	77
United Kingdom	1.7	79	77	78	82

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Research Report

THE EMERGING NEW FOOD SHOPPER

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

THE EMERGING NEW FOOD SHOPPER

September 1982

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper industry and its advertisers. These reports from the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

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STUDY HIGHLIGHTS

A multi-method study of food shoppers from across the nation found a new kind of food shopper was emerging in response to the tight economy and greater health and weight-control concerns. Perhaps the single most important thing to be said about the new food shopper is that s/he is under more pressure than ever before: in an era of depression when income may go down but prices continue to rise, food budgets are being stretched and stretched; in an era of emphasis on nutrition, weight-control and natural foods, ingredients, diets and cooking require more knowledge and effort than ever before. The shoppers are more likely to have second jobs and therefore less time to shop. It is no wonder that few people enjoy shopping and that some few see themselves in conflict with stores and distributors. Here are the highlights of the study:

- Nutrition and taste of food were ranked most important to shoppers; cost and convenience were less important.
- The most educated shoppers were most concerned with food nutrition.
- Age makes little difference, but women are more concerned with nutrition (44%) than male shoppers (27%).
- They are buying less meat and more chicken and fish.
- They are stretching meals with large quantity cooking, and in some instances, smaller portions.
- Sweets and "goodies" are being reduced or eliminated from shopping lists.
- 48% consider generic or no-label items to be a good value, but over a third said they had not tried them or their store did not carry them.
- Shoppers are becoming more systematic in their shopping, almost shopping engineers; 71% made shopping lists.

- A third said they make extra trips for sales and bargains.
- 48% have either demoted a sotre from their first to second store or quit their store in the past year.
- Shopper are becoming more demanding and they like efficiency and pleasantness in stores and personnel.
- The optic scanner checkout system is generally considered to be a sign of a modern, efficient store.
- 74% used reduced price coupons, and some were doing so for the first time.
- Those who spend most on food are most likely to be heavy coupons users.
- There is more cooking at home.
- Newspapers are shoppers' most important source of food and store information; 71% checked food ads each week in newspapers, up from 61% in 1963.
- 53% checked food ads in weekly newspapers.
- Newspaper food ads are considered to be more believable than TV commercials.
- 89% get reduced price coupons from newspapers.
- 84% read a daily newspaper in the past week, above the national average.

THE EMERGING NEW FOOD SHOPPER

Introduction

It has become apparent that significant changes have occurred recently in customers' attitudes toward food stores, the products they bought, and the actual shopping process. Consumers seem to be concerned with both price and total cost. There seems to be a new meaning to quality, usefulness, and nutrition for many shoppers. These changes seemed to be fueled by the impact--perhaps both real and psychological--of a depressed economy. Obviously, if true, such changes will have great impact on successful marketing strategies of both retailers and manufacturers. To explore and call attention to some of these new trends in food buying behavior, the NAB's Research Department set up the following study.

The NAB Study

To explore and call attention to some of the important current trends in food buying behavior, a comprehensive approach was taken, employing several different research techniques. Each technique provides a different way of viewing the same subject and in doing so serves as a check-and-balance on the other techniques, as well as permitting some unique observations. A structured survey, in-store personal qualitative interviews and qualitative group interviews were used.

1. The telephone survey of 558 main food shoppers was carried out by Hayes, Nedved and Associates from March 24th through April 5th. Approximately 50 interviews were done in 11 cities across the U.S.A. In each case, the interviews were with shoppers of specific stores selected in ad-

vance from a standard nationwide sample of NABSCAN stores. Half of those interviewed were regular store customers and half were not. While this is not a strict probability sample, the sample was similar on a variety of characteristics to sample norms accumulated by the Hayes, Nedved and Associates organization in other food store studies.

2. Personal interviews were conducted by Dr. Clyde Nunn of the NAB Research Department. Approximately 15 interviews were done in each of 9 of the same food stores sampled in the telephone interviews. These interviews were done during the same time period as the telephone interviews. A total of 135 interviews were completed. Of all the people approached while they were waiting to check-out of the food stores, only two refused to be interviewed. In fact, cooperation was extremely good and for the most part, people were enthusiastic about the interview. The interviewer took special care to inform the respondents that he was not associated with the store and asked each to be as frank as possible in their responses. A semi-structured interview approach allowed the interviewer to probe for unclear or new avenues of thought, an advantage that this approach has over the structured questionnaire approach. All interviews were tape recorded and transcribed for analysis.

3. Finally, with these two data collection experiences accomplished, a qualitative research agency, Social Science Applications, was contracted to carry out focused group interviews with two groups of 12 food shoppers in the New Jersey area. These group discussions of topics previously covered in the other approaches were used to get additional details or nuances that the other data collection efforts suggested. Each group

session lasted approximately 1½ hours. A full report of the results of the focused group interviews is found in the Appendix of this report.

References to each of these three data sources will be made throughout this report. Dr. Nunn is the author of this report. The Appendix report was written by Blanka Eckstein of Social Science Applications.

Our appreciation is extended to those stores that willingly permitted us to do interviews with some of their customers. They were:

Von's
Star
ShopRite
Jewel
Price Chopper
Winn Dixie
Safeway

I. WHAT THEY ARE BUYING AND WHY

What food store items people buy depends on a number of personal and socio-economic factors, not the least of which are personal taste, nutrition, convenience, and cost. Each of these is important at least to some food shoppers, but according to the telephone survey, some are more important than others.

Table 1 presents the results of our query about the relative importance of each to the food shopper sample. At the top of the list of importance were nutrition (41%) and taste (40%). Cost of food (14%) and ease of food preparation (5%) were much further down the list. So, despite the economic pressures of the times, most shoppers still feel that what they get in their food and how it tastes to them are by far most important to them when they make their food selections. This is not to say that food cost is unimportant to most of them. Indeed, only 15 percent of those who said nutrition was most important said cost was least important. Nineteen percent of shoppers who indicated that taste was most important said cost was least important, but 59 percent of the food shoppers who felt convenience of preparation was most important said cost was least important.

The important point here is that while food costs are important to shoppers these days, and they spend a considerable amount of time and effort to combat rising costs, most food shoppers shop with other concerns clearly in their minds--nutrition and taste.

Table 1

Most Important Consideration When Food Shopping

	% "Most Important"
Nutrition	41%
Taste	40%
Cost	14%
Preparation Ease	5%
N = 536	100%

Over 80 percent (81%) of the sample said either nutrition or taste was their most important concern in food shopping. Whether they said nutrition or taste was most important, both groups ranked cost and convenience at the bottom of the list. The fact that nutritional value and taste of food are deeply imbedded concerns among American food shoppers should remind us that despite inflationary food costs, most American food shoppers are not rushing out to buy the least expensive food items and abandoning notions of healthy and tasty foods. Even among the 14 percent who said cost was their most important concern, over a third (34%) said nutrition and 48 percent said taste were second in importance when they shopped for food.

What food items shoppers buy is not a simple, straightforward, economic decision. Instead, it is a complex set of choices, that are often difficult. They are often faced with choices between cost and quality, taste and nutrition, old and new products, and on and on. In addition there are decisions about how to cut costs, meal planning, and fitting all of this into busy schedules. In the meantime, the "information society" has exploded on the scene, giving rise to more information about nearly everything. Education levels have been rapidly rising, and in the Age of Mass Media, information is available daily.

As a consequence, food buying is no longer a process depending mainly on preferences and ways of shopping passed on by mother. Instead, new information must be collected almost daily and one's resourcefulness depended on to make the best buys. What is emerging is a new kind of food shopper who is far more sophisticated and demanding than in the past.

Education and Food Shopping

The sophistication of the food shopper is clearly seen when educational levels are considered. In Table 2, there is a statistically significant relationship between education and what is considered most important in food shopping. The best educated are substantially more concerned with nutrition than the less educated, who consider taste and cost more important than the best educated.

Table 2

Education and What is Important in Food Shopping

	Most Important				
Education	Nutrition	Taste	Cost	Preparation Ease	(N)
College grad or more	48%	37%	10%	5%	100% (241)
High school grad	36%	46%	14%	4%	100% (202)
Less than H.S. grad	33%	38%	21%	8%	100% (93)

Age and Sex and What is Important in Food Shopping

While there is no statistically significant relationship between age and food shopping values (Table 3), sex of the shopper makes a definite and statistically significant difference (Table 4). Females are much more likely (44%) than males (27%) to place a greater value on nutrition, while male shoppers consider taste and ease of food preparation more important than females. Both sexes consider cost of food of equal importance. Even though men made up 13 percent of the main food shoppers interviewed, what they shop for is guided more by what tastes good and how easy it is to prepare than are women shoppers.

Table 3

Age and What is Important in Food Shopping

	Most Important				
Age	Nutrition	Taste	Cost	Preparation Ease	(N)
Under 34	38%	46%	11%	5%	100% (159)
35-64	43%	38%	14%	5%	100% (279)
65 +	43%	36%	16%	5%	100% (100)

Table 4

Sex and What is Important in Food Shopping

	Most Important				
Sex	Nutrition	Taste	Cost	Preparation Ease	(N)
Female	44%	39%	13%	4%	100% (468)
Male	27%	45%	14%	14%	100% (71)

Impact of Health and Weight Concerns on Food Buying

A common theme that ran through many of the in-store interviews with food shoppers around the nation was a concern about what is in food that might make them less healthy or overweight. Here is a sample of reactions, with the interview location indicated after the quote:

> Well, my shopping habits are changing because I'm on a diet but you know, for the last few years, I've been interested in eating sensibly; natural cheese, for example, instead of processed cheese. Buying natural foods, not buying stuff that's loaded with chemicals, you know.--Boston
>
> The quality. Usually I am extremely picky what I buy. I read labels. I don't buy sugar. None of the sugar stuff, the chocolate isn't for me, it's for my husband. That's how I buy too. I don't buy anything with MSG. I try to stay away from salt and sugar.--New Jersey
>
> Manufacturers should promote foods without preservatives. I'm not a health nut, but I really do try to buy things that are better prepared.--San Francisco
>
> More fruit and less meat. Fruits and fish and less beef.... Price has something to do with it, but we are trying to eat more of the healthy type food.--Fort Worth
>
> I would rather have strawberries than junk food.--Jacksonville
>
> Yes, I'm buying more fresh vegetables and forgetting the frozen vegetables, for instance, and I'm cooking. I'm more conscious of red meat being marbled with a lot of extra calories and fat, so we eat more chicken and fish than we used to, and eat only fresh vegetables anymore. I read every label, for salt content. I don't buy health foods per se because I think they're expensive. I just like to buy the things in their natural state and make my own recipes and I'm very conscious of sodium content.--

But sometimes health concerns and weight control conflict, as was the case for this shopper:

> We don't eat much sugar. I use Sweet and Low. I know that's bad for you, but I don't want to get fat.--Fort Worth

Impact of Costs on What Foods They Buy

Cost of food was also present in shoppers' minds as we talked to them in the check-out line. Most of them had adjusted what they were buying because of costs. Here are some typical comments:

> I buy instant coffee rather than percolated coffee since I don't make a whole pot every morning. I didn't used to think about that. Now, I'd be throwing away about half of it, so....--Los Angeles

> I don't buy expensive meat. I buy a lot of ground beef and chicken and I buy whole chickens rather than cut up.--San Francisco

> A lot of convenience foods we don't buy as much anymore. I make more things from scratch. And we have cut down on the amount of snack items.--Atlanta

> Usually I leave off ice cream and things like that.--Atlanta

> I don't buy as much baked goods either. I bake more myself now than I used to.--Chicago

> I do. I'm buying the cheaper brands, when I know I'm putting it in something like stew, and I'm not saying that I always find good name brands that much better.--San Francisco

> Well they've got the generic items--much more reasonably priced and even though I know the other stuff might be a little better quality, but I'll go to the generic.--Chicago

> I shop smaller. I buy smaller pieces of meat and smaller quantities, that's because it's best for us, isn't it? The more we have, the more we eat. So we buy smaller.--San Francisco

National opinion surveys by the Roper Organization showed that more consumers are trying generic foods (63% in 1980, compared to 48% in 1979).[1]

Our telephone survey also revealed that a substantial percentage of shoppers were turning to generic brands in response to rising costs. Forty-eight percent said generics were a good value. By that they apparently meant more than just cheap, since there were only small differences in the percent who thought generics were a good value between shoppers who ranked nutrition and taste most important and those who ranked cost and convenience most important. Table 5 shows that shoppers who said cost was most important to them while food shopping were a little less likely (44%) than those who said nutrition (50%) or taste (48%) were most important to agree that generics were a good value.

Table 5

Generics as a Good Value and
What is Most Important in Food Shopping

Most Important	Generics a Good Value
Nutrition	50%
Taste	48%
Cost	43%
Preparation Ease	44%

This speaks well of generics. They seem to be thought of as both cheaper and of good nutritional value. It is also important to point out that over a third of the shoppers said they did not know if generics were a good value or not, or their store did not carry generics, or they did not know if the store carried generics. This suggests that supermarkets have a good opportunity to increase their sale of generics, if they carry them, by better advertising both their availability and value.

---

[1] R.L. Wills and R.L. Mentzer, "The Effect of Generics on the Food Market Structure," National Food Review, Spring, 1982, 7-10.

In a combination concern about cost and health, a solid majority of shoppers in the food stores said they were buying less red meat, especially the more expensive cuts of beef. Chicken was mentioned as the item most often substituted for red meat. Here are a few of the many comments on meat buying:

> We eat cheaper cut of meat more often and a more expensive cut is something we'd have on special occasions.--Atlanta
>
> Less red meat. Price primarily but cholesterol reasons also, and we are just eating less red meat, more chicken, more fish.--Fort Worth
>
> We, for a number of years, have really not eaten that much meat. I haven't bought a roast for I don't know how long. We eat mostly chicken and hamburger, so our meat is pretty limited anyway.--San Francisco
>
> Meat, it stretches, instead of two pork chops, I get one pork chop for a meal now.--Jacksonville
>
> More fruit and less meat. Fruits and fish and less beef.--San Francisco
>
> I have been. Now, for instance, steak, stuff like that, I just cut that out, I have just not been using them, like I had been now. I used to have them all the time in the house.--Boston

Perhaps these concerns explain the large changes in U. S. Government figures on meat, fish and fowl consumption.

Department of Commerce reports that per capita beef consumption increased from 85 pounds in 1960 to 128 pounds in 1976 but began to fall off sharply from 124 pounds in 1977 to 103 pounds (estimated) in 1980. Fish and chicken consumption, meanwhile, have increased. Fish consumption increased from 10 pounds in 1960 to 13 pounds (estimated) in 1980 and chicken from 28 pounds in 1960 to 50 pounds (estimated) in 1980. Pork consumption has also been on the rise since 1976, from 59 pounds to 73 pounds (estimated) in 1980.

II. HOW THEY ARE SHOPPING

The combination of concerns about food costs and food content have caused shoppers to not only alter what they buy but have also modified the way the go about food shopping. Food shopping today is perceived as far more serious today than it was in the past. Shoppers find that the many and sometimes conflicting decisions required of them today dictate a more systematic, conscious, and sophisticated approach. In some instances, they have almost become shopping engineers. In their own evaluations they plan more, budget more, make more comparisons of store items, make more lists, and sometimes even use hand calculators in stores.

In every store where we interviewed shoppers, several persistent and strong impressions emerged. The great majority of shoppers registered concerns about the cost of food. Most expressed an interest in the health or weight control aspects of food. But, most impressive was the resourcefulness with which shoppers dealt with the dual concerns about the economy and food content. In this section, we will look at each of these and show how and why a more sophisticated food shopper is emerging.

Shopping Engineers

One of the most frequent mentioned aspects of the new shopping engineers was the more systematic planning that is taking place today. There is a sense of more meal planning for the week before shopping, both because shoppers want to be sure to have well-balanced meals and to be economical. Planning also helps cut down on the number of trips to food stores. Many shoppers mentioned that they were making fewer trips. Usually, they gave gas-saving as a reason, in addition to the fact that the fewer times they go to the store, the less they buy or the more economical are their purchasing patterns. However, extra trips to stores are made usually to pick up items that are advertised bargains. One-third of those interviewed by phone said they made extra trips for sales or bargains.

Another part of planning is writing out a shopping list, again because it helps control what they buy and how much they buy. In the phone survey, 71 percent said they made shopping lists. This contrasts rather sharply with a NAB study in 1978 when 58 percent of the main food shoppers said they made shopping lists. Often shoppers would mention that they organized their shopping lists according to the arrangement of items in the store so that they could more efficiently move through the store. Knowing where items were in the store was important to many shoppers. This desire to be familiar with a store probably reduces the likelihood of shoppers changing their main food stores often.[1] Nevertheless, the strong push to be economical in their shopping has probably reduced store loyalty based in large part on familiarity. In the telephone survey three-quarters of the shoppers said they used a second store in the past two weeks and 31 percent used a third store. More to the point here, however, is the fact that 21 percent demoted a store that used to be their first store, and 27 percent stopped buying from a store in the past year. That represents a potential shift of 48 percent, so food customers

---

1) This desire to know item location is the source of the frustration shoppers sometimes express when stores change item locations.

are not merely sticking with a store because it is convenient or familiar although these factors are still important in the choice of a main food store.

Shoppers are very much aware of price differences between stores. Much of this awareness comes from their frequent comparison of store advertisements, a point we will pursue in more detail in the next section. In the telephone survey, 63 percent said there were price differences between stores. They are also aware of other differences between stores.

The Food Store

Food shoppers appear to becoming more demanding, not just in the sense of getting a good value, but in the total shopping environment in which they shop. They like a clean, efficient, and pleasant store, with friendly and responsive personnel. They like good selection and convenience. In the appended report from the focused group interviews with main food shoppers, more can be found regarding their likes and dislikes about food stores, but meanwhile consider some comments from in-store interviews with shoppers as they were checking out:

> I like everything under one roof. Instead of running everywhere. And really it is quit convenient. It is like shopping in a mall I guess. You have your variety here.--Chicago
>
> Well, I don't know, it's nice, everything's in order, you can find things.--Kansas City
>
> Because they have a bigger selection. If you come in at off times, you can get in an out pretty fast and they pretty much have what you come for.--New Jersey
>
> Probably because they have more variety.--Chicago
>
> They just have everything I like, its convenient and I enjoy coming here.--New Jersey

Close and I know where things are at. And it is just as cheap.--Atlanta

The produce in the store is great, it's a very nice store. --San Francisco

There is just something about the store. I don't know, the food is, it just seems like some things here are a little cheaper than other stores to me. There is something about this store I just really love.--Jacksonville

Better values and the produce is much better, the meat is fantastic.--Los Angeles

Because its clean and I like it and the prices.--Jacksonville

It's because I know where things are, so it is convenient. --Los Angeles

Well I guess because I can buy almost anything here. I don't have to make a half dozen trips.--Chicago

We think it has a very good selection. We usually find here what we want.--San Francisco

I like the atmosphere.--Jacksonville

The Optic Scanner Check-Out System

One of the symbols of a modern, efficient store is the optic scanner check-out system. In-store interviews were done in stores with this type of check-out system, and generally, most shoppers had come to accept or even prefer the optic scanner. There was no indication of a wholesale rejection of this new technology--nor sheeplike acceptance. Most found the scanner a sign of a modern, efficient store. They especially like the improved itemized receipt that the scanner computer produced, which seemed to reduce anxieties about the accuracy of this new, high-speed machine.

Here are some typical reactions to quiries about the scanner:

Oh I love it. It is fantastic. It saves a lot of time. --Chicago

I think its excellent.--New Jersey

It's fine with me. It really doesn't matter. Sometimes I still like the, oh, I don't know, maybe it's not as good as if it had the prices on the boxes as you go through so you'll know what the prices are when you're shopping for the item. It's OK.--Kansas City

I have found that there's less errors with it.--San Francisco

I trust it a little bit more because the checkers over there I have to watch them. They don't always know what is on special. A lot of them are high school girls that just can't possibly keep up with the price changing.--Ft. Worth

When they are working, it goes faster. Sometimes they malfunction. This is the hardest part, waiting.--New Jersey

I think it's much faster. I think it's more accurate too. --Boston

No I think it has been accurate, I usually check my food bill over when I get home and I do find it faster. I have no feelings about it one way or another.. Just so I get in and out as fast as I can.--Chicago

It's alright . Yes, I don't find any fault with them.--Boston

I think it's really good. It's pretty fast and efficient. --Los Angeles

Yes, I do like the scanners. I do find it more efficient. I do find it quite efficient. I have gone to other stores where they don't have this, you get tied up for hours, you know, it's lines and then you don't know what you bought.--Boston

I think so. I think it's a lot quicker, probably more accurate. Very satisfied with the store.--Los Angeles

But this works faster because I was coming here when they had no scanners, and scanners work a lot faster.--Boston

I watch it. I have a pretty good idea of what the prices are. I've been at it a long time and I watch it. I like it, it goes a lot faster, but still I watch it.--Boston

Cost Cutting

Rather than just begrudgingly resigning to the impact of the inflationary economy, most food shoppers displayed an astonishing resourcefulness in dealing with high food costs. Because of their strong preferences for nutritional and good tasting food, most consumers do not easily give up these preferences just to cut costs. Hence, food bill reductions are not just a matter of finding the cheapest item. Instead, a more complex set of concerns leads them to typically strive for good value--a balance of good quality and price. A variety of approaches to cost cutting are usually employed. Some of the more frequently used approaches will now be described.

In the search for good values, shoppers clearly turn to sales and bargains, since this usually allows them to get the food they prefer at reduced prices. One-third make extra trips for sales and bargains. Cheaper cuts of meat are being used more often. Many are discovering generic goods and house brands for the first time, and about half of them consider generics a good value.

One of the most striking impressions about food shoppers and their cost-cutting strategies was the extent to which reduced price coupons were being used. Nearly three-quarters (74%) said they used coupons, and those who did not use them often self-consciously apologized for not doing so.

Here are some comments from shoppers about coupons:

> (Do you use coupons? I see you have some there. Is that something you started doing recently or.) Yes, recently, Before I would never use them.--Kansas City
>
> No, I've been very good with coupons and comparing prices lately.--New Jersey
>
> Well I do look for the coupons in the paper, and I did try to take advantage of coupons.--Atlanta
>
> Well, I am interested but I don't go for coupons because I am a very busy lady. I work 7 days a week and I have a family to run and a girl in college so I am going 24 hours a day.--New Jersey
>
> Yes, I cut coupons out of the newspapers.--Jacksonville
>
> I'm using coupons for one thing, which I never did before. I never had the time. I worked, and I didn't have time to fool with then.--Los Angeles
>
> No, I don't use coupons either. I probably should but I also find with the coupons that there's a lot of food that aren't really necessary. I mean there's a lot of already prepared things like that, not your basic foods. They don't usually have coupons for that. It's always the things that you wouldn't necessarily, that you wouldn't normally buy. So I don't, I have kind of given up on that.--San Francisco
>
> Yes, sales and I get all the coupons I can from the papers. --Jacksonville
>
> I buy the specials that they have. I use a lot of rebates and coupons.--Boston

It was also clear from our telephone survey that it is more than just those who are most concerned about costs that are using coupons. Table 6 shows that coupon use cuts across all types, even the majority of those who say convenience is most important in their shopping.

Table 6

What is Most Important in Food Shopping and Coupon Use

Most Important	Usually Use Coupons	(N)
Nutrition	76%	(223)
Taste	74%	(216)
Cost	77%	(73)
Convenience	56%	(27)

However, in Table 7, we see that redemption of a lot of coupons (5 or more) is most often found among the most cost-conscious. The impact of convenience on multiple coupon use can also be noted, with less than a quarter (24%) of those who say convenience is most important redeeming five or more coupons per week.

Table 7

What is Most Important in Food Shopping and Redemption of 5 or More Coupons Per Week

Most Important	Redeem 5 or More Coupons Per Week	(N)
Nutrition	33%	(175)
Taste	33%	(165)
Cost	42%	(59)
Convenience	24%	(17)
Not cost	29%	(399)

However, only 5 percent of all main food shoppers say convenience is most important in food shopping.

Heavy users of coupons (5 or more per week) tend to be those who spend most on food purchases (Table 8). While there is no statistically significant difference between amount spent on food in a typical week and use of coupons, there is a statistically significant relationship between amount spent and redemption of five or more coupons.

Table 8

Average Amount Spent on Food Per Week and Redemption of Five or More Coupons

Average Weekly Food Bill	Redeem 5 or More Coupons Per Week	(N)
$100 +	44%	(73)
$63-$95	49%	(81)
$32-$62	32%	(183)
$5-$31	18%	(78)

Shoppers seem to be cutting costs by controlled purchasing. That is, they say they are buying less, especially items like expensive cuts of beef, so-called "junk" food and "goodies." They also report, in some cases, that they are serving smaller portions and trying more diligently to stick to their shopping lists.

Cooking more often at home was often mentioned as a way that they were controlling costs, more are cooking baked goods from scratch. Some are cooking large quantities at once, saving the left-overs for another meal or two. Some are turning to occasional meatless meals, and others rely on cheaper stews, pasta, and bean dishes.

III. NEWSPAPER AND THE NEW FOOD SHOPPER

A new kind of food shopper is emerging, according to the evidence presented thus far. he or he (14% of the main food shoppers surveyed were men) is highly conscious of the quality of food, the cost of food, and the ambience and efficiency of the food store where shopping is done. The new food shopper is more demanding of stores and of themselves. They exploit an amazing array of information, techniques, and strategies in vigorous efforts to get the most for their money. Good value seems to be their prevailing concern.

Shopping decisions, as a consequency, have become more complex, hence, more and better information is required so that good value decisions can be made. We asked good shoppers a variety of questions about their attention to information about food and food stores and where they got their information. In both the in-store personal interviews and in the telephone survey to shoppers in the market areas of the stores, newspapers were reported to be their most important source of information about food.

Newspaper Versus Television

Newspapers clearly emerged as both the most widely used source of food information, and as the most trustworthy source. Even though shoppers were not asked directly about the relative reliability of newspaper and television advertisements, several shoppers volunteered their appraisals:

> Q: Where do you find out about good buys for example? Do you look in newspapers, watch television, listen to radio?
>
> A: Well, I like to look at a newspaper for bargains or sales, mostly sales.

Q: What about television?

A: Television commercials I can't stand.

Q: Why is that?

A: I think most of them are phoney. They don't really give an example.

Q: What about newspaper advertising, do you find that a little more believable or . . .? Is it more convenient or what?

A: It's not pressure. In the newspaper if you want that product you can buy it, and if you don't, you keep on going.--Kansas City

Q: What about television, do you watch advertisements on television about stores, for example, this store?

A: Oh, sure. I see them.

Q: Are they very helpful in your shopping?

A: No, I think its better when you read it.--New Jersey

Q: Do you just buy by going to the store, or do you see them on television or in the newspaper?

A: Paper, yes. And occassionally I'll see a sale on television that strikes my fancy but not so much of the time. I don't pay too much attention to television and commercials sales because most of the time they are doing that to get you in. Newspapers are pretty honest.--Ft. Worth

Q: What about television advertisements?

A: They don't turn me on.

Q: They don't give you much information?

A: No, I don't buy from the commercials.

Q: You don't find them helpful at all?

A: No, they are just trying to sell the products whether they are good or not.

Q: There is also food advertising in stores and newspapers. Why do you find that more helpful?

A: Well you can compare the prices of the other stores of the products you are going to buy.--New Jersey

Scanning the Newspaper

Below are some typical responses to questions about where they got their information about sales and bargains in food stores. The first quotation illustrates the kind of careful information-seeking so characteristic of the new food shopper and the main source of that information -- newspapers. The "Q" and "A" in the quotations refer to the questions and the shopper's answer. While the questions sometimes seem to be leading the customer, this is mostly due to the fact that the interview content prior to the quoted remarks led the interviewer to ask these kind of questions.

> Q: You basically depend on newspapers to give you the information you need?
>
> A: That's right. You just can't come in a store because you spend too much time checking all the items and this way when I come in to a store, I will know if it is 5 or 6 cents more because I have been scanning the newspapers all week.--New Jersey
>
> Q: Where do you get your information about those sales and bargains?
>
> A: Mostly in the paper, the local papers.--Boston
>
> Q: And where do you find out about the sales and bargains?
>
> A: Oh, I read the paper. I get all the papers.--Kansas City
>
> Q: Would you say cost of items is your most important concern about shopping today?
>
> A: Yes, it is.
>
> Q: Has that become more important to you recently?
>
> A: More important. I compare shop and I use the unit price.
>
> Q: You compare shop within the store?

A: Yes, within the store, and I look in the papers every Wednesday and Sunday at the different supermarket advertisements and I compare prices and I find that this one is . . .

Q: If you see good buys in another store in a newspaper, for example, would you tend to go to that store to get those?

A: Just to get that particular buy not to do my major shopping, but just to get that particular buy.--New Jersey

Telephone Survey Results

These in-store comments expressed in shoppers' own words were also reflected in the telephone survey data from other shoppers in the store area.

Newspaper reading is a common practice among food shoppers. In fact, they tend to be more frequent readers of newspapers than is true of general public. In the telephone survey, 84 percent said they read or looked at a daily newspaper in the past seven days.

Seventy-one percent looked at food advertisements in newspapers (Table 9). There has been a substantial increase in the percentage looking at newspaper food advertisements. In a 1963 NAB study, 61 percent looked at food advertisements, compared to the most recent study when 71 percent looked at advertisements. Fifty-three percent checked food advertisements in weekly newspapers. Fifty-four percent check food advertisements in circulars, mailing pieces, or flyers each week.

Table 9

Checking Food Advertisements

Source	% Check Each Week
Daily newspapers	71%
Weekly newspapers	53%
Circulars, mailings, flyers	54%

Newspapers are a major source of food information and advertisements. Newspapers also assist information-seeking food shoppers by providing additional editorial information on nutrition, weight-control, recipes, and best food buys. Furthermore, newspapers are the major source of reduced price coupons, which have become almost universal among food shoppers trying to cut costs.

Reduced Price Coupons

Comments from consumers and survey evidence reported in preceeding sections of this report, revealed this importance of coupon use among food customers -- most do not leave home without them. In Table 10, the telephone survey results show that newspapers are by far the main source of their coupon collection. Eighty-nine percent of those who use coupons get their coupons from newspapers. The next most likely source is through the mail, but only seven percent mention the mail. Other sources, including home deliveries and magazines, round out the list.

Table 10

Source of Food Coupons

Source	%	(N)
Newspapers	89	(371)
Mailings	7	(29)
Other home deliveries	1	(5)
Magazines	1	(4)
Other	2	(10)
N =	100%	(419)

Here are some responses to our in-store questions about where they get coupons:

Q: Now, where do you get coupons?

A: Out of the newspapers.--Los Angeles

Q: How do you find out about these bargains?

A: I have the leaflets. I get them out the newspaper, and I collect the coupons, I do the whole bit. --Chicago

Q: How do you do that? Do you follow sales for example?

A: Yes, sales and I get all the coupons I can from the papers.--Jacksonville

Q: Are you feeling like you are cutting off a little bit in terms of quality for the price?

A: No, but I find I save more coupons than I ever did.

Q: Where do you get these coupons?

A: In the newspaper.--New Jersey

Q: I see you have some coupons there. Do you use those regularly to cut the cost down?

A: Yes.

Q: How do you get your coupons?

A: Generally through the newspaper. Most of them come through the newspaper.--Jacksonville

Q: How do you find out about, I notice you have coupons, for example . . .?

A: Regularly, very regularly, in all the papers, the Sunday paper usually has a whole section on couponing and then Wednesday the local paper has two or three pages of coupons and I go through the one I need, and I save them. And I would say as long as five years ago I didn't know what a coupon was. So, I do have my little folder, and I save my coupons, and I put them in their right order and I come here, and I check them out.--Boston

APPENDIX

CONSUMERS' ATTITUDES TOWARD SUPERMARKETS, FOOD SHOPPING AND COUPONS

Prepared for The Newspaper Advertising Bureau

by

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Social Science Applications

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A. OBJECTIVE AND METHOD

The objectives of this research were to learn if, and how, consumers have been changing their patterns of and attitude toward food shopping, food preparation and consumption in response to economic and/or health and diet concerns.

Specifically, information was sought about:

- Shoppers' attitudes toward supermarkets and their feelings about food shopping.
- Shoppers' attitudes toward coupons.
- Recent changes in food shopping patterns.
- Recent changes in family eating/cooking habits.
- Shoppers' expectations of and attitudes toward future developments in supermarket services.

The information was elicited in the course of two focused group interviews with female "principal food shoppers" conducted in a research facility in Hasbrouck Heights, N.J. on April 13, 1982. Twenty women participated in the two sessions.

The women were between 24 and 50 years old, had annual household incomes of $15,000 to $50,000 and were long time residents of the Hasbrouck Heights/Teaneck, N.J. area. Sixteen of them were married and four divorced. All but one were mothers--between them they had 42 children, ranging in age from 8 mos. to 24 years.

Six of the participants were full-time housewives, seven had part-time jobs and seven were employed full-time. Their jobs varied--there were teachers, nurses, secretaries, a waitress, a nursery school owner-director, a computer operator, a travel consultant, an x-ray technician, etc.

B. SUMMARY

1. Generally women do the family food shopping, while husbands do "fill-in shopping." Some couples--usually younger ones--shop together on a regular basis.

2. Women spread their food shopping across several stores, though all have one "main" supermarket.

3. Food shopping patterns have changed in the past year or two in terms of where, how and what consumers buy.

   a) Some shoppers have switched or added stores--usually going from more to less expensive ones, i.e., some now shop in Basics (a no-frills store). Working women switch stores for greater convenience of location and shorter lines.
   b) Most have increased their use of coupons.
   c) Most have cut back or eliminated steak or expensive cuts of meat from their menu. They have alsc cut back on non-essentials ("extras", "junk food"). This was generally done to reduce food bills, but is reinforced by health and diet concerns.
   d) Many women are now buying sale items or "specials" in quantity, to maximize their savings. Some have bought freezers to increase their storage capacity.

4. Food preparation and eating habits in the respondents' families have changed for reasons of a) economy, b) health and nutrition concerns, c) weight consciousness, d) convenience--particularly among working women.

> The families are eating more chicken and fish, less red meat. The families are consuming fewer snack foods. These, sometimes called "junk foods" or "extras," include sodas, pretzels, potato chips, Yodels, Twinkies, candy, some cookies, some sugared cereals.
>
> Some women, particularly mothers of teenagers, serve foods designed to curb weight gain, others are focusing on avoiding preservatives and other chemicals. By and large, health/nutrition/weight consciousness appears to be increasing.
>
> Respondents' families are eating more soups and stews. These are gaining in popularity because they are "cheaper," more "convenient to prepare in advance" and "filling and nutritious." Women are cooking "in quantity" and freezing the overage for future meals.

5. What women like most about their supermarkets is being thoroughly familiar with them, so they know where everything is and can shop systematically.

What they dislike most are long check-out lines, slow, inattentive cashiers, finding that store is out of stock of an advertised "special," seeing higher prices pasted over last week's lower ones, being over-charged by cashier or scanner, shopping with young children, and cluttered aisles and crowded stores.

6. All the women use coupons--some occasionally, some extensively. All the women look at newspapers for food advertising and for coupons.

Not all women like coupons. There seem to be four types of responses concerning coupons. Some women like them unequivocally--they use them and are delighted with the savings. Some women give very little thought to coupons, use them rarely and invest no feeling in the matter. Many women see couponing as a game in which the manufacturers/supermarkets try to outsmart them, get the better of them; some of these women enjoy this challenge and like playing the game--others resent it and don't like to at all.

7. Asked to suggest improvements for supermarkets, all the women ask for faster, more efficient check-out, for uncluttered aisles and for toilet facilities.

8. Expected future developments in supermarkets are expanded use of scanners, and shopping by computer/television.

FINDINGS

I Who Does the Food Shopping

Most of the women shop for food alone or assisted (or handicapped) by their children. Sometimes they persuade their husbands to take on this task; more commonly husbands do "fill in" shopping. Some, mostly younger, couples make food shopping a shared activity. This is what women report about who does the shopping:

> "A lot of times my husband comes with me. That makes it easier--I don't have to guess what he likes, what he wants."
>
> "Usually we go together. I take the cart with the kids--and we throw everything we buy in his."
>
> "I shop with my two children--which is always an experience. If I'm bleeding or very ill, my husband will go."
>
> "Me and my children. They help. But they always make you spend more than you want to."
>
> "Me. Occasionally my husband. I just started that recently--because I've just had it. So he goes, with my daughter. And buys all kinds of unnecessary things."
>
> "I go with my husband--that's when I like it. It's the only time I really see him--we're always passing each other going out the door. We get all the family business settled while we shop. He makes it fun. And I don't have to carry anything."
>
> "It's always me."
>
> "I do the big shopping. If I run out, I like to send him, because he won't come home with a whole lot of extras."
>
> "I do the food shopping--twice a week."

II Stores Where Shop for Food

While all the women spread their food shopping over a fairly wide range of stores, all have a "main" supermarket where they do the bulk of their shopping. Most use more than one supermarket.

Pathmark serves as the "main" supermarket for about nine of the women; ShopRite for five; FoodTown for another five; Basics for one and a small market, IGA, for another. In addition, these women use: Kings, Grand Union, Quick Check, Patterson farmers market, Fairway, "the butcher shop", "the fish store", "the pork store", "the milk store", "the Polish butcher", "the Greek deli.", "Vasentini Bros.--for Italian specialties.

These women live in an area liberally sprinkled with supermarkets, so a great many stores are available to them at close proximity.

III Recent Changes in Food Shopping Patterns

Asked if their food shopping behavior had changed in any way during the past year or two, respondents reported some changes in _where_ they shopped, _how_ they shopped and _what_ they bought.

Changes in Stores

Two main trends account for switching or adding of stores. Some changes were made for reasons of _economy_--others, mostly by working women, were made for reasons of _convenience_. Consumers do not switch supermarkets lightly, because familiarity with a store counts for a good deal with them. Knowing a store's layout, knowing where everything is not only provides a sense of security and psychic comfort, but it also makes shopping easier and faster.

However, some shoppers gave up these advantages for gains in savings or for a better location or shorter lines. People trade-off these values depending on their particular situations. While none of these consumers switched to very expensive stores, some working women were willing to give up the very economical store for one almost as inexpensive, if it provided other values, such as being closer and having faster service.

> "I used to be a dyed-in-the-wool A&P shopper--I switched to Pathmark, primarily for price."
>
> "I used to shop in IGA--it's a small store, more expensive--because it was very convenient. I could do my week's shopping in a half hour. Then I started feeling guilty. So I went to Basics. They take double coupons. I went there to save money."
>
> "I look around for coupons. Sometimes one of the stores I shop will have them, sometimes another."
>
> "I switched--we now look for specials and double coupons. And I buy in quantity--buy in Basics for canned goods, go to another store for meat because of price and it's better. You shop more sensibly now--try to save whatever you can."
>
> "I switched from ShopRite to FoodTown because now I'm working full time and FoodTown is right across from me, more convenient. And there's always such a crowd at ShopRite--I find my time is just too valuable to spend so much time there. It's just more convenient to use FoodTown, even though I probably spend a little bit more there."
>
> "I used to use Pathmark--I also can't stand standing on line. Now that I'm working part time--I'm rushing all the time. So I found a little ShopRite that isn't crowded and is very good. On my way, too."

> "I just added a store--the one that has double coupons. Go there once a week and see what I need for the week."
>
> "I shop Basics, too--they have very good produce. And it's a savings."

Changes in Use of Coupons

While most of these respondents have used coupons off and on for a long time, some have begun using them only within the past two years. All the women have increased their use of coupons in that time period. The greater savings made possible with double and even triple coupons combined with the pressure of rising prices have inspired all these women to become coupon clippers and users. Some use them now simply because they would "feel guilty" if they didn't make this effort to improve the family's finances.

> "I've started using them when they started giving double or triple coupons--only within the past year."
>
> "I've been using them just this past year--I don't use them that often."
>
> "My shopping's changed in that I now save the ShopRite coupons from the paper."
>
> "Now I shop in the store that has the best coupon deal that week--among the three or four I use."
>
> "I've always used store coupons--Pathmark and ShopRite--but since about one and a half years am using manufacturers coupons. They're higher in value and I always think 'double'."

Changes in What Buy

There have been some changes in what is purchased in the way of food in almost every household represented by these women. All these changes occurred within the past one or two years. Most of them were dictated by the need to economize; others occurred in response to health/nutrition/weight or other concerns.

The most common recent differences in food purchases were:

1) a reduction or elimination of steak or other expensive meats from the family shopping list. Some families switched over entirely to "chicken and fish."
2) a reduction or elimination of non-essential foods, by which respondents meant both "extras" and "junk food"--many report they buy none or less of these. By "extras" they mean snack and between-meal foods, i.e., popcorn, frozen pizzas, etc. "Junk food" includes things like "barbequed potato chips", "your Twinkies and Yodels", "sodas, Dipsy Doodles, pretzels, candy", "six varieties of sugared cereals", etc.

Besides these changes, consumers report that their food buying has changed in another way; they buy "in quantity" those items which are on "special"/sale, etc. They "stock up" on chicken, shells of beef, paper products, butter, legs of lamb or whatever else is storable or freezable, when these are offered at a specially low price, thus maximizing their savings. A few women have bought freezers to take advantage of these bargains.

Thus, people are buying both less and more of various things than they used to. Less snack food, because "if it's there it will get eaten up." More bargains, because everyone has learned that prices go in only one direction; up.

> "I used to keep pretzels and chips a lot--and sodas. Now I only keep maybe one bag. I don't stock up like I used to."
>
> "Yes, I buy less. Simply less of the extras--the frozen pizzas, pretzels. Used to have lots of sodas in the house--now I have no soda."
>
> "I buy more because the kids are growing and eating more--but I buy less 'junk food'. Soda, cookies, potato chips. I mean cookies I have to keep--but not as many."
>
> "But I buy more of what's on sale. I have enough toilet paper--for a year! Paper towels--I stock up when they're cheap."
>
> "I have a basement--I stock up too. When I see something on sale--something I need--I stock up, buy as much as I can store. If it's butter, I'll buy 4 lbs."
>
> "I buy in large quantities now. When meat is on sale--like shells of beef, I'll buy two or three of them and put them in the freezer. Or chickens. I never did that before. Well, I never had a freezer before. That's the reason I bought the freezer--to take advantage and buy things when they're on sale."
>
> "I have eliminated a great amount of nonsense. I don't have six different boxes of cereal--they'll just have to make do with three."
>
> "We just don't buy red meat. Partly because of cholesterol, but mostly because of the price."
>
> "Sometimes I think we're going to turn into chickens. No more beef, that's simply become too expensive. And I buy fish--not that that's so cheap."

IV Recent Changes in Eating/Cooking Patterns

The eating patterns of the respondents obviously reflect the changes in their food buying patterns (discussed previously). But they also reflect other concerns and needs.

In general, the food preparation and eating habits of the respondents' families have changed recently for reasons of: a) economy; b) health/nutrition concerns; c) weight consciousness and, particularly among working women, d) convenience.

a) Economy -- The women and their families are consuming less red or other meat and more chicken, turkey and fish, and they are eating fewer "extra" or "junk foods" (as mentioned before). While the reasons for this are mostly economic, they are strongly reinforced by health/diet concerns, which probably lessen any sense of deprivation. The women point out that these foods are not good for one anyway, i.e., beef is high in cholesterol; "junk food" is fattening; sugar, in particular, is both fattening and unhealthy in the quantities consumed.

> "We also eat more chicken and more fish. For example, those pointy ends of chicken wings--we used to throw them away--now I make soup with them. My family's growing. They're eating more. Before I used to make chops and things--now, forget it."

> "Eat a lot more poultry and fish. Much less red meat. Watching cholesterol, plus high prices. Much less steak, or chopped red meat. It's been a gradual change over the the past four years."

> "Less cholesterol--that's why we are living on turkey and chicken. Plus it's cheaper. But it all has to do with more health."

b) Health/Nutrition Concerns -- The women express considerable concern with issues of health and nutrition. They feel responsible for what their children and mates are taking into their bodies at the family table. Some, in particular, need to worry about high blood pressure or cholesterol levels of their husbands, most want to avoid damaging chemicals or an excess of sugar--or, for that matter, any sugar and salt. They learn from the media or their doctors that this or that substance is not good for adults or children and try to avoid it.

Some women are told by their doctors (or even dentists) to limit the consumption of eggs since "they have cholesterol." Others won't use anything with preservatives.

There seems to be some movement toward greater use of fresh vegetables--promoted partly by taste/culinary fashion, partly by price (cheaper than frozen), partly by nutrition concerns (they believe canned vegetables are nutritionally inferior and may contain salt and/or sugar and/or preservatives).

Women make some attempts to avoid foods containing chemicals, but they are aware that they are insufficiently educated in that area to know the "good" chemicals from the "bad" ones.

> "I try to determine what's in the product. I'm getting to be a fanatic on preservatives--not that I understand what I read everytime; but what is listed first is what there's the most of."
>
> "My husband developed high blood pressure during the last year--so now I can't cook with salt. So that changed a lot. And not that much red meat."
>
> "I'm becoming a vegetable lover--without salt, without butter."
>
> "I've been avoiding salt--and sugar!--for a little over a year. I use other herbs and spices."

> "My daughter is staying with me--she sent me out to buy baby food and she said make sure it has no salt in it, no sugar in it--there I stand reading the labels."
>
> "I don't let my family eat a lot of eggs anymore--because of the cholesterol. And I serve less butter."
>
> "My dentist told me to throw the white bread out."
>
> "I go to the bakery a lot--I buy bread there. It's better bread, more nutritious."
>
> "Some of these chemical names are vitamins, so you have to be careful."

c) Weight Consciousness -- Diet and weight consciousness have influenced the food preparation of most respondents--particularly those with teenage children. Various strategems are employed: some cut down on butter and bread, others stop serving dessert, or provide "less fattening" ones--some only serve fruit for dessert. For some of these women the need to serve low-calorie meals is just one more problem to cope with--inasmuch as it often is in direct conflict with the need to serve low cost and good tasting meals.

> "We've cut back--or out--on desserts. Mainly serve fruit. Cut out the gooey heavy stuff mainly for diet reasons. We're eating healthy I think. More frozen and fresh vegetables--and chicken and fish."
>
> "That's why I don't buy canned goods, because they have so much sugar."
>
> "I cook mostly diet things--weight conscious. Because of my sons. Now I can't cook with butter. I just roast things, make plain baked potato and salad."
>
> "I have three daughters--each one is on a different diet. You think that's fun? It isn't easy."
>
> "We are drinking seltzer instead of regular soda. That has no calories in it. And no salt--which club soda does."

d) Convenience -- Both inflation and the time constraints of working women are contributing to the greater use of soups and stews in many homes. Both of these are less expensive to prepare, can be very tasty and nutritious, and, in addition, can be prepared well in advance and simply heated up. Working women also report they are cooking "in bulk"--they cook enough at one time to freeze the rest for one or several more meals.

> "I freeze more--cook in batches, quantity--and freeze. Since I'm working."

> "I make more soups--make large quantities and freeze them. Serve more chicken. Use cheaper cuts of meat. Soup goes further--it's healthy and filling."

> "I find I'm making more stews. And soups! They're nutritious--and a lot more economical. And I can make it ahead, they can just heat it up if I'm not home."

V Attitudes Toward Supermarket Shopping

Virtually nobody loves food shopping. The women's attitudes range from a neutral "it's OK" to an impassioned "I hate it!" Many more reasons are cited for disliking than for liking shopping, and the dislikes are always stated with more emotion.

Price is important in selecting and liking a store, but the tie that binds strongest seems to be familiarity. In addition, for most women--but for working women in particular--convenience (both of location and of a quick check-out) is also very important. Still, since knowing where everything in the store is also contributes to the speed of the operation, familiarity with a store is an important reason for liking shopping. It is particularly important for the very systematic shoppers who make their shopping lists with the store's layout in mind. Some women do not have a strong dislike for shopping. They make a game out of it--they approach it as a challenge. (None of the women who like shopping have to shop with young children or are on a very tight budget--these seem to be conditions inimical to shopping.)

Likes

These are some comments by women who like--or at least don't mind shopping in their supermarkets:

> "It's alright. It's knowing the store. I'm used to it. The prices are fair and I know where everything is."
>
> "Yes, what makes it easier for me is familiarity. Because you make a list and you do it systematically--you know your route; do one aisle, then up the next--so you make your list that way. All set for the attack."
>
> "When I make up my shopping list, I do it by the aisle. I know where everything in the store is, and my list is in that order."
>
> "No matter how long I have to wait, or how many people I have to bump into--I know where everything is, I know where I'm going. I think that's what I like best about my supermarket. Being familiar with it."
>
> "Well, I sort of like it that way too."

Dislikes

The following are circumstances or reasons why consumers do not like food shopping:

1. Shopping with children, particularly two or more young children.
2. Long lines at check-out counters. Particularly irritating are:
    a) Seeing many empty, un-manned check-out stations, but

only three or four operating--with huge, slow lines at each of these.

b) Cashiers and/or baggers chatting and socializing with each other, paying little attention to what they are doing. Cashiers or baggers who are studies in slow motion.

c) No baggers, or baggers just leaving their task, when the respondent reaches cashier.

d) Being stuck in line behind a person "with a million coupons" or behind someone cashing an un-approved check.

3. Crowding. Two many shoppers. Aisles crowded with cartons and boxes and clerks stocking shelves while store is busy. Floors being cleaned during shopping hours, with the results that extension cords get stuck in cart wheels.

4. Going for advertised "specials" and finding that store is already "out of stock" ("rain checks" are a small consolation to these shoppers--they require repeat trips and are deemed a waste of time). Having to figure out what to substitute for the "special" the consumer had planned to buy.

5. Seeing prices go up and up week after week. "Particularly infuriating" is seeing the new (higher) prices pasted over last week's (lower ones) on items. Having to think about the price of every purchase--having to stay (or try to stay) within a budget.

6. Hostile, unfriendly, uncooperative store employees.

7. Being overcharged. Some women report that this has happened to them since the introduction of the computerized scanners, for which they had high hopes. Consequently, those shoppers no longer have blind faith in computers, having learned that stores sometimes do not program in the lower sales prices of items.

> "I've located the hostile, bitter check-out girls and the nice, lovely ladies--and I'd rather wait on a longer line to get to a nice check-out lady that I've had before."
>
> "I used to like shopping better with just one child. Now one is screaming or jumping up and down in the cart. I'd rather go to a few shops, but with the two of them I just can't."
>
> "It's an ordeal because of the children. Sometimes I have all three, always at least two. So I go to my supermarket because I know it like the back of my hand and I can get out fast."
>
> "If you have the kids along it's Mommy buy me this and Mommy buy me that."
>
> "The A&P has most turn-over in help. At the A&P they are slow. Only have two or three cashiers open on a busy day--the line winds half around the block. Do you know how many times I've left my wagon there and just walked out."
>
> "I've done that at Pathmark. I just left my cart there all loaded up--just said 'goodbye' couldn't stand it anymore. Wasted all that time!"
>
> "They are always un-crating, unpacking boxes right when it's busy."
>
> "The aisles are full of carts and boxes. People run into the back of your legs with their carts! It's just too much for me."
>
> "Any time something is on sale, they are out of stock--although I know there are cases of it down in the basement."
>
> "And sometimes the cashiers are very slow--and they talk to the next one, and you're wondering if they are ringing up the right price."

> "The cashiers socialize with each other. Couldn't care less about what they're doing."

> "The ShopRite I go to now has a scanner which nine out of ten times doesn't work right. They don't program the specials or any new prices into the computer."

> "I hate it, as soon as you get to the head of the line, the bagger goes on a break, or to help someone else."

> "Or the cashiers change and they have to count their money."

> "Why do they have to be cleaning at 8:30 or 9 in the morning? They could do it earlier--polishing the floor, and your wagon wheels wouldn't get tied up with the cord--a nuisance!"

> "Frequently the sale items are gone--or you can't find them. And then you have to figure out what else to get."

> "I hate shopping! You constantly have to look at the prices of everything, see what's cheaper, check your budget."

> "I hate when they have the old price covered over with a new price--you know the new is higher. It infuriates me!"

In addition to these objective reasons for disliking food-shopping (spelled out above), some women have some more subjective ones. The current stress on weight control and health consciousness, combined with frequently changing news about the ill-effects of the chemical components of many foods, have produced a certain degree of uncertainty and confusion in some women. Badgered by (frequently mutually exclusive) demands for non-fattening, good tasting, healthful and inexpensive foods and meals, these women no longer know just what to put on the table. This too, contributes to making food shopping unpleasant.

> "As kids get older you don't know what to buy anymore. They're all on diets. I just don't know what to get. I'm getting to hate shopping."

> "I think you can go crazy. Some of these things are bad only if you eat them in great quantities."
>
> "No matter what you do, you're liable to do something wrong."
>
> "They tell you one thing one day and the next they take it back."

A Suggestion

What customers find particularly irritating when standing on a very long line at the check-out counter, is the sight of five, six or seven unmanned machines standing unused. Each customer then estimates how much faster she could get out of the store if management were to open a few more stations.

It is, of course possible that no cashiers are available at that moment, or that the store is understaffed that day, in which case the manager can't rectify the situation.

It might not be a great consolation, but a sign to that effect might help to diffuse consumer anger and irritation. A sign briefly stating the reason for the reduced number of cashiers, and an apology for the inconvenience would be a very inexpensive way to at least modify the distinct impression consumers have that management is simply not paying attention and that everyone is simply indifferent. The women's comments suggest that they are less offended by incompetence than by ill-will or indifference.

Degree of Trust

Distrust of supermarkets is fairly widespread among these women.

Many feel that at every turn the stores try to take advantage of them, and only by "learning the ropes" and staying alert can they defend themselves. They point out that the designation "special" doesn't necessarily mean "cheaper than usual," that larger packages are not necessarily more economical than smaller ones, that items on special display are not necessarily sale priced, that if you want to get the best break on price you should not cash in a coupon until a couple of weeks after it appears, when the price of the product is "down to normal" after having been "jacked up". This distrust extends of food manufacturers in general, at least among some women. On the other hand, some women develop confidence in one store or one chain and do not feel that they are at war with the merchandisers at all times.

> "You have to be on your toes. It's your body and it's your money--and you've got to take care of both of them. Because these people are out to sell a product, and they don't care what is in it."
>
> "Stuff they put on special display, may be priced even higher than normal--but they're creating the impression that its a 'special'. They try to pull some sneaky things."
>
> "Special doesn't mean anything--does not mean sale. Just means they're pushing it."
>
> "They are sneaky about the sizes too--often the large size is more expensive than two smaller ones. So I end up buying ten small boxes. Even with unit pricing they do it."

Shopping As a Social Occasion

While women say that socializing is the last thing on their minds when they shop, the fact is that the majority do it. They exchange greetings with people, they sometimes gossip, sometimes meet relatives, friends, neighbors with whom they have fleeting or more enduring contact. Most also have at least a nodding acquaintance with some store help.

Thus, in spite of their protestation to the contrary, one is led to conclude that "socializing" is part of the shopping experience, although perhaps a small one for these women. These are not home bound women, they do not seem to lack social interaction. But even for them, shopping is frequently an occasion for passing a few pleasant social moments. Their comments suggest that they enjoy these encounters more than they realize, and take them for granted.

> "I don't work in town anymore, so it's my chance to see everybody and catch up on everything."
>
> "I see my students and their parents."
>
> "I like the socializing, I just hate the shopping."
>
> "My husband coaches the basketball team and his entire team works at ShopRite--so he's always talking to someone. And I almost always run into someone, too."
>
> "I don't always like to socialize. It depends on who it is. Sometimes I see somebody and I'll go down another aisle."
>
> "It's really not that important. I could certainly live without it. It doesn't make that much difference."
>
> "My girlfriend and I sometimes shop together, which is really more of a picnic than doing what we are supposed to be doing. We stop in the aisles and see half the town there--catch up on gossip."
>
> "I ran into my cousin--my son was shopping for me--so I spoke to her for about 10-15 minutes, that was an epic."

VI Attitudes Toward Coupons

The respondents learn about specials and look for coupons in newspapers. All look in the papers for food advertising on Wednesday, most do so also on Sunday. They read the food advertising with an eye out for "specials" and coupons. They all clip the coupons--some virtually wholesale, others much more selectively, only for items they use, or want that week.

Another common source of information and coupons are the flyers and circulars mailed or distributed by various supermarkets.

Attitudes toward coupons--as well as their usage--vary considerably among the respondents. Virtually all the women use coupons to some extent. Feelings about them range from intense dislike and resentment to great liking and enjoyment--with some investing little feelings in the matter.

In practice, some of the women clip and save all coupons--from newspapers, inserts, magazines, store circulars, manufacturer's mailings, etc.--and have elaborate systems for organizing, categorizing, and storing them. These women often make out their shopping lists with the layout of the store in mind--so that their list reflects their progress aisle by aisle and they arrange their coupons in corresponding order, to be ready for the cashier. These women are systematic to the point where they should be granted the title of "shopping engineer."

Other women are much more casual and episodic in the use of and attention to coupons.

> "I try to do it systematically. I try to put them in separate envelopes; we write 'under the sink products', or 'canned things' on the envelope."
>
> "The night before I have my shopping list and I correlate the coupons to match. If I need detergent I don't care what kind it is. I'll take five different coupons and I'll go down the detergent aisle and decide which is the best buy and put the other four away."
>
> "I keep them in a big box on top of the refrigerator, by categories. Then I make up the shopping list, according to where things are in the store, aisle by aisle--and file the coupons in that order, too--to take them with me."

How often, or how systematically, a woman uses coupons does not necessarily reflect how well she likes them. Some who use coupons a lot love them, some hate them. Other women are neutral or find them, at most, a mild nuisance.

It would appear that there are at least four types of consumer responses to coupons.

1. Some--probably few--women pay very little attention to coupons or other special offers, and shop when and where they do on the basis of habit or convenience, not bargain inducement.

2. Some women like coupons unquestioningly and view them as a true savings. They are happy to be given this occasional "break" and delightedly add up the dollars they "save" each time they shop.

> "Those double coupons are a lot of fun. We save a lot--save maybe $18, $20 a week. The cashier loves us--here come coupons!...."
>
> "I hardly ever use coupons. Lately a little bit more. It's really an accident if I have one with me when I need it."

> "When I was home with the children I had time to fool around with them (coupons). Once I started working, I didn't."

> "Well, I enjoy it! When I save a lot of money with my double coupons--even though I spend a lot of money, it doesn't bother me as much, because I say 'look how much I saved'."

Beyond these consumers, there is a segment of women who have paid close attention to the business of shopping and by being observant have learned some things about food merchandising. This group of women has concluded that--like it or not--they are engaged in a game of tag, or perhaps blind man's bluff, with the store owners. While the entire group refers to the interaction between themselves and the stores as "a game"--the group is divided by the fact that some like and enjoy the game, while others dislike it and participate resentfully. Both sub-groups are quite inventive and devise various strategies to get the best of the "game".

3. Some women feel that they are being manipulated by the use of coupons. They are forced to spend much too much time on them and they feel that these are not genuine savings, because without the coupons food prices could be lower in the first place. Coupons, they feel, are a privilege for which they pay in the end, just as they did for food stamps. They comment that stores "juggle" their prices so that it's extremely difficult to tell a real bargain. For example, they say, a store will first mark up an item 60¢ and two days later offer a "50¢ off" coupon--and the gullible will gobble it up. Having been among the gullible in the past, they are now a little embarrassed

and considerably angry. Nevertheless, they can not abandon "the game," since they feel that in the long run they are paying for these coupons anyway, so the least they must do is get back as much as they can. They view this as a contest between themselves and the supermarkets--one they pursue quite relentlessly and grimly.

4. Finally, there are women who like and enjoy this game. They recognize it for what it is, just as their sisters do, but instead of resenting it, they accept it as an exciting and/or amusing challenge. For these women, beating the stores at their own game is one of the major rewards of shopping, and it makes what would otherwise be a boring activity interesting and fun.

What reaction a woman will have depends more on her temperament and personality than on demographics, at least judging by our sample. However, it is likely that shoppers of a lower socio-economic status would be less apt to conceive of the notion of "game" and would be more apt to accept coupons at face value.

> "I know they raise the prices for couponing. But you've got to remember--I shop in two places, Pathmark and ShopRite, so I'm fully aware of what the normal price is that week. I think that's the challenging part--to outsmart them and get the stuff at the best buy for your money."
>
> "It's a game--it's a challenge. It's them and you. It's your money, or them getting it. And you want the most for your money. I think it's a challenge. An exercise every week."
>
> "Sometimes I find another product is still cheaper even with the double coupon. You have to be so careful--I wish they wouldn't do that."
>
> "Wish they'd do away with the coupons--just lower the prices."

> "To us it's a game. We look to see--'ok, how much did we save this week'."
>
> "When you see the coupon in the paper--the price on that item has just been jacked-up. So I just keep mine--sometimes they expire!--and in a couple of weeks it's back down to normal--you can then get it much cheaper. I use the coupon then."
>
> "It reminds me of the S&H green stamps. It's the same thing, and I hated that too. It's disgusting--it's such a rip-off. It's just time consuming, you're not really saving anything because they elevate the price, they force you to use their product...."
>
> "No, I don't really like them. I just use them. Actually, you almost have to."
>
> "It's more time consuming, using coupons."
>
> "I hang on to coupons until there is a sale on the item--like toilet tissue, other paper products, You can make it work for you."
>
> "If I have a coupon I'll use it. But I don't like the time it takes. I don't have the time! In order to do it, you have to organize them and categorize them--takes time. So now I just cut the ones out that I actually need then."
>
> "Well, if you use the coupon at least you don't have to feel you're being totally ripped-off."

VII Suggestions for Improvements in Supermarkets

Asked what improvements they would like to see instituted in their supermarkets, the women make rather reasonable--not pie-in-the-sky--suggestions.

1. They are virtually unanimous in wanting a better managed check-out experience. What the stores need is a bagger for each cashier, cashiers who work and pay attention, and a sufficient number of cashier stations open to make long waits unnecessary.

2. They would like toilets--clean toilets!--if not for their own use, then at least for young children.

3. They want wider aisles, or they ask that shelves be stacked at night or at day break, so aisles are unobstructed during shopping hours. Ditto for cleaning floors.

VIII Expected Future Developments

These consumers have already accepted the reality of check-out scanners, although these machines operate in only a few of their stores. Most of them like them well enough, but they are disappointed about their lack of accuracy. They had thought that at last they could relax the vigilance with which they watch the cashiers so they wouldn't make a mistake. A machine at first promised greater efficiency (perhaps perfection)--particularly in combination with the new tape which clearly identifies each item purchased and which the women like a lot. Unfortunately, by now most of them have been disabused of the idea of the scanner's accuracy through personal experience.

However, they are receptive to these changes, and don't exhibit any "techno-resistance."

> "I used to feel very safe with them (scanners) until that large error that cost me several dollars and a trip back."
>
> "I love the tape though--the way it's all written down, itemized. That's good."
>
> "The corn was on sale and the machine put it through at a higher price. So I said to her 'this is on sale' and the girl says 'where?'. I showed her and she had to change it. But it should have been in the computer."

> "I just like to look at what they're ringing up. I feel that if you're spending $100, you should check."
>
> "Scanners are here to stay. People will just have to get used to them."

Most of the women name "computer shopping," or shopping from your video or television screen, as the next coming development. When they begin to consider how this might actually work, many are not sure they are going to like it or use it very much.

In spite of all the current complaints about food-shopping, most of the women don't want to be deprived of the experience of touching, examining and choosing their products. Not only do almost all want to pick out meat and produce in person, but some even say they want to pick out packaged and canned goods to make sure they are intact, not cut or dented.

Next they consider how the food would "get to you at home," and a majority concluded that this system of shopping, with home delivery, would be too expensive.

> "How can you be sure you'll like the pineapple you get? I want to pick out my own, ripe one."
>
> "I want to pick out my own broccoli and tomatoes and melon...."
>
> "No, not even boxes--sometimes when they open the cartons, they slice the top of the boxes off. I don't want to get one like that! I want to be there to pick out everything myself."
>
> "How would they deliver it? Wouldn't that be too expensive?"

"I don't think you can order it off the screen. Maybe packaged or canned stuff. But I wouldn't buy meat or produce that way."

"I could do the bulk of the shopping that way--then go pick it up. And buy meat and so on in specialty stores."

METHODOLOGICAL NOTE

The following tables are provided for the reader who is interested in obtaining a quick estimate either of the stability of a given percentage or of the significance of the difference between two percentages.

Confidence Intervals for a Given Percentage
(at the 95% confidence level)

N	Reported Percentage				
(Base for %)	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	2.6	3.5	4.0	4.3	4.4
250	3.7	5.0	5.7	6.1	6.2
200	4.2	5.5	6.3	6.8	6.9
150	4.8	6.4	7.3	7.8	8.0
100	5.9	7.8	9.0	9.6	9.8
50	8.3	11.1	12.7	11.6	13.9
25	11.8	15.7	18.0	19.2	19.6

Example: If a report shows that 20% of all respondents (when N = 500) answer in a particular way, the chances are about 95 out of 100 that the true value is 20% or - 3.5%, that is, that the range 23.5%-16.5% contains the true value.

Significance of Differences Between Percentages
(95% confidence level)

Average of the Base of Percentages Being Compared	Average of Reported Percentages				
	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	3.7	4.9	5.7	6.1	6.2
250	5.2	7.1	8.1	8.6	8.8
200	5.9	7.8	8.9	9.6	9.8
150	6.8	9.1	10.3	11.0	11.3
100	8.3	11.0	12.7	13.6	13.9
50	11.7	15.7	18.0	19.2	19.7
25	16.7	22.2	25.2	27.2	27.7

Example: A report shows that 33% of all respondents from 30 to 39 years of age use a certain product and that only 27% of all respondents in the 40-to-49 age group use that product. Could this difference be due to chance?

In this example assume an average base of 500 for the represented percentages. The average of the percentages (33 + 27) equals 30% and the difference between the percentages is 6%.

Since 6% is greater than 5.7 (the figure in the table for this base and percentage) the chances are about 95 out of 100 that the product is used more by the 30-39 age group.

The table values are based on an assumption of simple random sampling. The figures may be too large if a stratified sampling technique was used and probably are too small if a cluster sampling technique was utilized. (For formulas used, see McNemar, Psychological Statistics, pages 54, 60.) The second table should be used with extreme caution if the bases being averaged are very different.

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Research Report

Key Facts About
Newspapers and Advertising
1982

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

BEST AVAILABLE COPY

Key Facts About
Newspapers and Advertising
1982

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the Newspaper business and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

November 1982

How To Use "Key Facts"

This report presents a compilation of data from many sources. Its main purpose is to answer some of the most frequently asked questions about newspapers: the size of the weekday and Sunday audiences; the sales effects of newspaper advertising; the newspaper's share of local and national advertising; and so forth.

The report is designed mainly as a reference source, not as a report to be read through page by page. To maximize its reference value the table of contents groups specific items of information under a few broad headings such as "Advertising Costs" and "Newspaper Circulation".

For example, if a quick overview of the size and characteristics of the daily newspaper's audience is needed, this comes under the general classification of "Newspaper Readership". Under that heading the desired information is listed as "Daily Newspaper Audience".

The scope of this reference source is necessarily limited. For answers to other questions about newspapers and newspaper advertising, consult the heading, "Information: Who To Call At NAB".

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Most Believable Advertising Medium

	Percent Selecting Medium	Rank of Medium
Newspapers	42%	1
Television	26	2
Magazines	11	3.5
Radio	11	3.5
Direct Mail	5	5
All about equal	2	NA
No Opinion	3	NA

Question: Which of these five media would you say has the most believable advertising?

Source: Opinion Research Corporation, Caravan Express, August 1981.

Percent Who Look Forward to Advertising in Four Media

	Percent
Newspaper	44%
Magazines	29
Radio	10
Television	9

Question: I am going to read four statements about different kinds of advertising. Please tell me whether you mostly agree or disagree with each one: When I pick up a newspaper, I look forward to the ads....etc.

Source: Audits and Surveys, Inc., 1977.

Cents-Off Coupons

Newspapers continue to be the medium through which most coupons are distributed.

Coupon Distribution Patterns

	1981	1980	1979
Newspapers	78.5%	75.6%	76.7%
Daily	27.3	31.1	36.2
Co-op	17.7	17.1	16.1
Sunday supp.	7.3	9.0	9.5
F.S.I.	26.2	18.4	14.9
Magazines	11.8	13.3	12.2
Direct Mail	3.3	3.4	3.2
In/on pack.	6.4	7.7	7.9

Source: Nielsen Clearing House, 1982.

Movement of Products Supported by Couponed Newspaper Advertising

	Lipton Lots-a-Noodles Soup	Minute Maid Apple Juice
Week before ad	252 units	79 units
Week of ad	456	239
Week after ad	326	222

Source: NABSCAN, 1981, based on data from 7 scanner stores in 7 different cities.

Estimating Ad Readership

There is no objective or absolute measure of advertising exposure for any medium, but the use of particular approaches as relative measures tends to reveal the same underlying principles. For example, proven recall scores are consistently lower than Starch "Noted" scores based on recognition, while Starch scores in turn are generally lower than exposure measures obtained through the use of an eye camera. However, all three methods would show that larger ads tend to be associated with higher levels of exposure.

Since all approaches to measurement also suggest that exposure levels vary with the creative treatment, only a readership survey can provide any benchmark on a specific ad's attention value. In those cases where it is essential to estimate an ad's exposure level, Starch "Noted" scores serve the purpose as well as any measure, because these scores fall in an intermediate range and tend to be fairly constant over time.

Average Starch "Noted" Scores for 22 Product Categories

Size Category	SAU Equivalents*	Average Noted Score Men	Average Noted Score Women
140-299 lines	SAU 14, 18, 19	18%	20%
300-599 lines	SAU 8, 13, 16	25	30
600-999 lines	SAU 10, 12	30	37
1,000-1,499 lines	SAU 3, 7, 11	34	39
1,500 lines & over	SAU 1, 2, 4, 5	44	47

*SAU equivalents shown are based on an 8-column format.

Source: Daniel Starch, Inc. (for Million Market Newspapers), 1961-1967.

Ad readership varies little whether the ad appears on the left or right side of the page...

	Left	Right
Men	99	102
Women	100	100

...above or below the fold...

	Above Fold	Below Fold
Men	99	101
Women	100	100

...or in the gutter or outside position.

	Gutter	Outside
Men	100	101
Women	101	100

NOTE: Index--readership of average ad=100.

Source: MMN Starch Studies of 32,000 ads.

How Advertising Exposure Accumulates with Multiple Insertions

As might be expected, it is even more difficult to determine how many people are reached by multiple ad insertions than to measure the impact of a single ad.

However, if it can be assumed that the likelihood of newspaper readers seeing one or more ads in a campaign is approximately the same as the likelihood of seeing one or more in a single newspaper issue with the same total number of insertions, then it is possible to estimate the cumulative effect of multiple insertions. Any overstatement resulting from this assumption should be offset by the cumulative build-up in the total audience of the newspaper itself.

In order to estimate the net reach of two or more advertising insertions, the first step is to establish the average exposure level for a single insertion, either through custom research or by the use of an estimate. Given this base figure, it can be assumed that multiple insertions will build along the lines shown in the following table.

Estimated Net Reach and Frequency for Multiple Ad Insertions

Noted Score		Number of Ads in Campaign				
		One	Two	Three	Four	Five
20%	Net reach:*	20%	30%	38%	45%	50%
	Avg. freq:	1.0	1.3	1.6	1.8	2.0
25%	Net reach:*	25%	37%	46%	53%	59%
	Avg. freq.	1.0	1.4	1.6	1.9	2.1
30%	Net reach:*	30%	43%	53%	61%	67%
	Avg. freq:	1.0	1.4	1.7	2.0	2.2
35%	Net reach:*	35%	50%	60%	68%	74%
	Avg. freq:	1.0	1.4	1.8	2.1	2.4
40%	Net reach:*	40%	55%	65%	73%	79%
	Avg. freq:	1.0	1.5	1.8	2.2	2.5
45%	Net reach:*	45%	60%	70%	78%	84%
	Avg. freq:	1.0	1.5	1.9	2.3	2.7

*Net reach=percent of exposed audience reached one or more times.

(For a fuller discussion of this issue see, "Yardstick of Accumulative Newspaper Ad Readership", Newspaper Advertising Bureau.)

NEWSPLAN: Discounts for Continuity

ONE PROGRAM:

NEWSPLAN's only purpose is to make national and regional advertising more effective by giving it the believability, immediacy and selling impact of ROP newspaper advertising at lower cost and greater convenience.

THREE BENEFITS:

1. Lower cost for the advertiser

   By planning ahead, you can earn discounts from 10 to 30% or more with NEWSPLAN. Plan your advertising on an annual basis to make sure your cumulative space--in lines or modular units--equals 6 pages, 13 pages, 26 pages or 52 pages. Discounts at these page levels are now in effect in over 1,000 newspapers representing 82% of total U.S. circulation.

2. Simplified specs for the creative department

   In all 1,430 daily newspapers representing 93% of total daily circulation now accept SAU's (Standard Advertising Units). In most cases, this means the convenience of preparing only one finished mechanical for all the newspapers on your schedule.

3. Better audience data for marketers and planners

   CAN DO gives you net reach and frequency data for any daily or Sunday newspaper schedule and any geographic area, dow to the county level. Audience figures can be run by sex, age, household income or household size. CAN DO computer runs are available through your own terminal if you are an IMS subscriber or through NAB at our cost.

For more information on NEWSPLAN, call Mac Morris at (212) 557-1865.

Standard Advertising Units (SAUs)

The Standard Advertising Unit system was set up through the cooperative efforts of the newspaper business and a number of advertiser groups in order to simplify the production of newspaper ads and cut costs.

The SAU system consists of 25 individual advertising sizes that can be accepted by all broadsheet newspapers regardless of their format or page size, plus five alternative sizes. Within these standard sizes are 15 units that also meet the needs of tabloid newspapers. In all, 1,430 newspapers representing 93% of total daily circulation now accept SAU's.

SAU's range in size from a full page 13" wide and 21" deep (SAU No. 1) to small-space ads 1 3/8" wide and 1" deep (SAU No. 25).

The SAU system has generated such widespread interest that plans to extend and improve the modular unit concept are well underway. A tentative new system designated "Newspaper Advertising Units" is considering a standard broadsheet page width of 13", a standard 6-column format for advertising, and a unit of measurement based on inches. Advertising and newspaper groups considering the NAU proposal will probably offer their final recommendations by February 1, 1983.

For more information, call Charles Kinsolving at (212) 557-1850.

How Can Intermedia Advertising Costs Be Estimated?

Media planners often need to compare the cost of various advertising media. The Designated Market Area (DMA) is a geographic unit that readily lends itself to this purpose, because the 205 DMA's account for the total land area of the United States.

Intermedia cost estimates can best be expressed in terms of households rather than adults because current household figures are published for both broadcast and newspaper circulation.

Since major advertisers and agencies are usually concerned with advertising schedules rather than single insertions, the logical measure of potential exposure is Gross Rating Points (GRP's) rather than net reach.

Because of variations in newspaper page sizes and column widths, the use of milline rates complicates intermedia comparisons. Expressing newspaper costs in terms of Standard Advertising Units (SAU's) greatly simplifies calculations.

The table on page 9 illustrates how these basic units can be used for intermedia comparisons, in this case between TV and newspapers. This table shows marginal differences in the household universes for newspapers and TV because Nielsen household estimates are 98% of forecasts (year ahead) by Market Statistics whereas newspaper DMA's are 100% of Market Statistics updates (year past) on the 1980 Census.

The table on page 9 compares the cost-per-household GRP of the newspaper space unit (SAU 13) and TV time unit (30 seconds) most favored by national advertisers. For TV, the daypart used is prime time because this is the period offering the largest dual audience.

It should be kept in mind that the figures shown represent a generalized estimate used in the initial stages of setting up a media plan. A final media plan specifying particular TV programs and individual newspapers might show slightly different results.

For further details on intermedia comparisons contact Ed Finlay at (212) 557-1858.

7

DAILY NEWSPAPERS VS. TELEVISION
DMA HOUSEHOLD AND COST/HH GRP COMPARISON

		PRIMETIME TELEVISION-30 sec.		NEWSPAPERS--SAU 13	
		HH (000)	COST/HH GRP	HH (000)	COST/HH GRP
1.	NEW YORK	6,409.7	$ 478	6,515.3	$ 460
2.	LOS ANGELES	4,214.6	394	4,217.3	265
3.	CHICAGO	2,944.9	302	2,964.7	209
4.	PHILADELPHIA	2,400.8	208	2,408.6	205
5.	SAN FRANCISCO	1,950.3	222	1,952.5	165
6.	BOSTON	1,920.1	218	1,915.7	185
7.	DETROIT	1,658.9	147	1,662.3	152
8.	WASHINGTON D.C.	1,467.6	134	1,464.9	160
9.	CLEVELAND	1,402.0	106	1,409.0	96
10.	DALLAS-FT. WORTH	1,355.9	181	1,343.8	125
	TOTAL TOP 10	25,724.8	$2,390	25,854.1	$2,022
11.	HOUSTON	1,255.0	$ 166	1,236.4	106
12.	PITTSBURGH	1,202.5	107	1,206.5	115
13.	MIAMI	1,099.7	139	1,095.7	65
14.	SEATTLE-TACOMA	1,093.8	111	1,091.8	90
15.	MINNEAPOLIS-ST. PAUL	1,071.4	104	1,064.7	80
16.	ATLANTA	1,062.7	108	1,046.2	75
17.	ST. LOUIS	1,029.4	109	1,036.4	80
18.	TAMPA-ST. PETERSBURG	1,028.8	78	1,007.6	76
19.	DENVER	858.9	119	844.3	60
20.	BALTIMORE	835.2	111	833.0	78
	TOTAL TOP 20	36,262.2	$3,542	36,316.7	$2,847

Sources: Market Statistics, Media Market Guide, SRDS, Circulation.

Where to Obtain Rate Information

Current information on ROP rates for daily and Sunday/weekend newspapers is available from the Marketing Services Section of NAB. Contact Jim Conaghan at (212) 557-5482.

Through NAB's NEWSPLAN, over 1,000 newspapers representing more than 82% of total weekday circulation offer discounts to national and regional advertisers who place ROP linage or modular units equal to six or more pages per year. For more information, contact Mac Morris at (212) 557-1865.

Current information on rates for preprints and inserts is available from Jack Aldinger at (212) 557-1847 or Ted Knecht at 557-1848.

Among the Marketing Services reports that include rate information are the following:

METROPOLITAN MARKETS 1-125 BY HOUSEHOLDS
METROPOLITAN MARKETS 126-300 BY HOUSEHOLDS

United States markets ranked by number of households in SMSA. Lists all newspapers with at least .05 ratio of circulation to households or more than 25,000 circulation. Includes time of publication; ratio of circulation; open line rates; and cost of 1,000 lines, one page and 20,000 lines. Published separately for weekday and Sunday/weekend editions.

300 METROPOLITAN MARKETS BY HOUSEHOLDS

Same information as above for all newspaper groups with at least .05 ratio of circulation to households in the top 125 markets, a .10 ratio in markets 126 through 300, or more than 25,000 circulation in the SMSA. Published separately for weekday and Sunday/weekend editions.

CUMULATIVE CIRCULATION AND RATES OF NEWSPAPERS IN 300 METROPOLITAN MARKETS NECESSARY TO OBTAIN 60% HOUSEHOLD COVERAGE IN EACH MARKET

Summary data on the above statistics for the top 10 markets, the top 20, etc.

TOP 300 METROPOLITAN MARKETS: ROP COLOR AND MEZZOTINT

U.S. NEWSPAPERS WITH ZONE EDITIONS

Product Movement of Advertised vs. Unadvertised Items

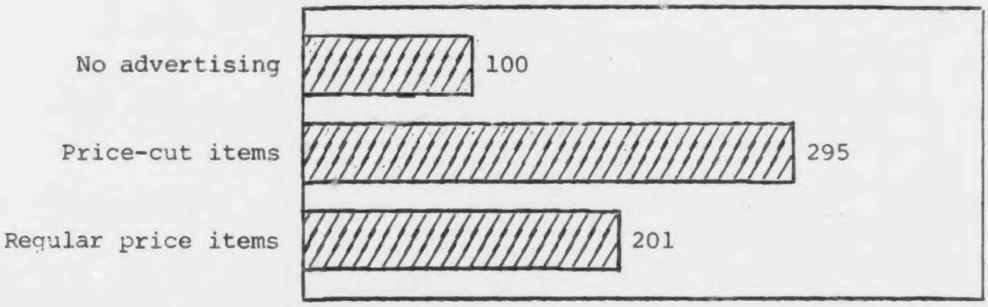
The availability of computerized scanner data permits the measurement of store movement for specific brands and sizes of package goods.

In 1980, data were analyzed from 17 stores in the NABSCAN program, covering 20 ads and 479 items. Unit and dollar sales were recorded for these items for the week of the ad, and two weeks before the ad (the base period).

RESULTS

For all advertised items, dollar sales were two and a half times as high as they had been during the base period when no advertising appeared for those products.

Results show that, on average, newspaper advertising triples the volume of items advertised at cut prices. The sales effectiveness of newspaper ads doesn't depend on price cuts--advertising goods at regular prices can double sales.


Sales results

For those items without a price cut that were "featured" by the largest amount of advertising space, the index was 288. For the average item that was "promoted"--the next largest space--the index was 188. Even for just "liners", the index was 134.

1981 National Advertising Investments in Newspapers
Arranged by Media Records Classification
In Thousands of Dollars

Classification	1981	Percent
Alcoholic Beverages	$ 94,965	3.7%
Amusements	12,598	0.5
Automotive	369,429	14.5
Cameras, Photo Supplies & Services	16,511	0.7
Educational	28,506	1.1
Farm and Garden	29,467	1.2
Foods	179,426	7.0
Help Wanted	68,616	2.7
Hotels and Resorts	105,061	4.1
Household Furniture and Furnishings	13,397	0.5
Household Heating & Home Heating Equipment	14,603	0.6
Household Supplies	40,068	1.6
Household Equipment and Appliances	67,566	2.6
Industrial	57,158	2.2
Insurance	40,688	1.6
Jewelry, Watches and Silverware	8,769	0.3
Mail Order	72,994	2.9
Medical Products and Drugs	24,040	0.9
Pets and Pet Supplies	8,853	0.4
Political	9,989	0.4
Professional and Service	11,663	0.5
Public Service Utilities & Communications	56,492	2.2
Publishing and Media	197,710	7.7
Real Estate	20,954	0.8
Sporting and Leisure Time Equipment	13,532	0.5
Tobacco	391,283	15.3
Toiletries and Toilet Goods	32,506	1.3
Transportation	369,191	14.4
Wearing Apparel	40,330	1.6
General Not Elsewhere Classified	159,885	6.2
GRAND TOTAL (Thousands of Dollars)	$2,556,250	100.0%

Figures do not include production costs.

Source: Media Records; Newspaper Advertising Bureau.

Newspapers are largest advertising medium in the U.S.

Total Advertising Volume in the United States

Millions of Dollars

Medium	1979		1980		1981 (Prelim.)	
Newspapers total	$14,493	29.2%	$15,541	28.5%	$17,420	28.4%
national	2,085	4.2	2,353	4.3	2,729	4.4
local	12,408	25.0	13,188	24.2	14,691	24.0
Magazines total	2,932	5.9	3,149	5.8	3,533	5.8
weeklies	1,327	2.7	1,418	2.6	1,598	2.6
women's	730	1.5	782	1.4	853	1.4
monthlies	875	1.8	949	1.8	1,082	1.8
Farm publications total	120	0.2	130	0.2	146	0.2
Television Total	10,154	20.5	11,366	20.8	12,650	20.6
network	4,599	9.3	5,130	9.4	5,575	9.1
spot	2,873	5.8	3,269	6.0	3,730	6.1
local	2,682	5.4	2,967	5.4	3,345	5.4
Radio total	3,326	6.7	3,702	6.8	4,212	6.9
network	161	0.3	183	0.4	220	0.4
spot	667	1.3	779	1.4	896	1.5
local	2,498	5.0	2,740	5.0	3,096	5.0
Direct Mail total	6,653	13.4	7,596	13.9	8,781	14.3
Business Papers total	1,575	3.2	1,674	3.1	1,841	3.0
Outdoor total	540	1.1	578	1.1	650	1.1
national	355	0.7	364	0.7	419	0.7
local	185	0.4	214	0.4	231	0.4
Miscellaneous total	9,787	19.7	10,744	19.7	12,087	19.7
national	5,065	10.2	5,663	10.4	6,410	10.4
local	4,722	9.5	5,081	9.3	5,677	9.3
Total national	27,085	54.6	30,290	55.6	34,280	55.9
Total local	22,495	45.4	24,190	44.4	27,040	44.1
GRAND TOTAL	$49,580	100.0%	$54,480	100.0%	$61,320	100.0%

Estimates include all costs: Time and talent, space and production.

Source: McCann-Erickson, Inc.

Newspaper Advertising Expenditures
Millions of Dollars
Production cost estimates included

	National	Retail	Classified	Total
1960	$ 778	$2,100	$ 803	$ 3,681
1961	744	2,053	804	3,601
1962	722	2,103	834	3,659
1963	702	2,211	867	3,780
1964	773	2,344	1,003	4,120
1965	783	2,429	1,214	4,426
1966	887	2,645	1,333	4,865
1967	846	2,760	1,304	4,910
1968	889	2,919	1,424	5,232
1969	943	3,166	1,605	5,714
1970	891	3,292	1,521	5,704
1971	991	3,562	1,645	6,198
1972	1,103	3,957	1,948	7,008
1973	1,111	4,236	2,248	7,595
1974	1,194	4,552	2,255	8,001
1975	1,221	4,958	2,263	8,442
1976	1,502	5,651	2,757	9,910
1977	1,677	6,216	3,239	11,132
1978	1,787	6,994	3,926	12,707
1979	2,085	7,801	4,607	14,493
1980	2,353	8,565	4,623	15,541

Source: McCann-Erickson, Inc.; H.C. MacDonald for classified 1960-1966; NAB estimates for classified 1967-1980.

Preprint Advertising in Newspapers

Circulation Growth of Inserts

	Free-Standing Inserts Card & Multi-page (Millions)	Roll-Fed Hi-Fi & Spectacolor (Millions)	Total (Millions)	Free-Standing Insert Revenue* (Thousands)
1971	8,912	1,088	10,000	NA
1973	11,895	905	12,800	NA
1975	15,800	261	16,000	NA
1977	20,101	165	20,266	$1,086,000
1979	27,132	85	27,217	1,776,604
1981	28,708	62	28,770	2,288,542

*Based on a 12 page tabloid--includes printing and inserting.

Free-Standing Inserts

Today an insert can be distributed in nearly every daily and Sunday newspaper in the United States. Circulation achieved is more than 59,000,000 daily and 52,000,000 Sunday. Over 50% of the Sunday newspapers can distribute an insert in less than their full run circulation. Over 75% of the Sunday newspapers will accept a product sample attached to an insert. Over 75% of the Sunday newspapers will accept an envelope either empty or containing multiple inserts or coupons.

Sizes are almost limitless. You can make an insert as large as anything that fits into the newspaper when folded to 11" x 13" or as small as 5" x 7". Formats are equally unlimited. From a single page to a 96 or more page booklet. Inserts can be long or short and include flaps, envelopes, gate folds, reply cards, coupons, perforations, fragrances etc. Inserts can be printed on all types of paper from ordinary newsprint to super-coated card stock.

There are many variables which affect the printing cost: size, number of pages, colors, paper weight and finish, perforating and plate changes to name just a few.

Here are some typical average national insert CPM's for Sunday newspapers in the Top 100 SMSA's:

	Total Circ. (000)	2 Pages	4 Pages	8 Pages	12 Pages	16 Pages	24 Pages
Top 10	16,000	29.30	29.82	33.72	37.63	42.35	51.02
Top 25	25,000	29.35	29.95	33.83	37.92	42.68	51.10
Top 50	33,000	29.38	30.31	34.83	39.50	44.49	52.94
Top 75	37,000	29.20	30.23	35.04	40.14	45.39	54.02
Top 100	40,000	29.34	30.37	35.17	40.41	45.67	54.40

NAB--June 1982

NAB's One-Order/One-Bill Service

Estimates and information can be obtained from Ted Knecht or Jack Aldinger of our Insert Division at (212) 557-1847/8. The Insert Division is set up to provide advertisers and agencies with all the information needed to plan and execute any type of multi-newspaper insert program, including specifications and availabilities, as well as cost estimates for printing, freight and inserting. The Insert Division will handle all paper work, make reservations, issue insertion orders and forward payment ot every newspaper on the schedule, billing you on one invoice. Feel free to use this valuable service.

CAN DO

The Newspaper Advertising Bureau's CAN DO program can:

- produce detailed audience data for any list of newspapers
- provide data customized to any geographic or demographic definition
- calculate reach and frequency estimates
- allow media mix analyses through IMS systems for other media
- deliver data output via an on-line computer system.

CAN DO data are available for every daily and Sunday newspaper in the United States.

CAN DO uses county building blocks to estimate audiences for all SMSA's, ADI's, DMA's or customized areas of three or more counties constructed on whole county lines. And CAN DO provides estimates for the most important audience breaks--age, sex, income and household size.

If you provide us with your audience rates, CAN DO will give you specific cost-per-thousand information on your newspaper audience.

For further information on CAN DO, contact Uldis Grava at (212) 557-1854 or Susan Lorenzana at 557-1896.

The great majority of newspapers offer ROP color advertising. In the top 300 markets, less-than-one-page ads in BW&1C can reach 93% of the total weekday circulation. Ads in BW&3C can reach 85% of the total circulation.

Percent of Total Circulation Represented by Daily Newspapers Offering ROP Color[1]

	Accept Less Than Full-Page Ad			Accept Full-Page Ad		
Market Rank:	One Color	Two Colors	Full Color	One Color	Two Colors	Full Color
Top 25	84.5%	73.7%	71.4%	88.8%	81.9%	79.7%
26-50	100.0	97.2	92.8	100.0	97.2	92.8
51-75	95.8	99.6	97.2	99.6	99.6	97.2
76-100	100.0	98.1	97.0	100.0	98.1	97.0
101-200	99.1	97.6	97.2	100.0	99.8	99.4
201-300	100.0	98.9	97.5	100.0	98.9	97.5
Cumulative:						
Top 50 markets	88.6%	79.8%	77.0%	91.8%	85.9%	83.1%
Top 75 markets	90.1	82.6	79.8	92.9	87.8	85.1
Top 100 markets	90.9	83.9	81.3	93.4	88.7	86.1
Top 200 markets	92.3	86.2	84.0	94.6	90.4	88.3
Top 300 markets	92.9	87.1	85.0	95.0	91.2	89.0

Sources: SM Survey of Buying Power, 1981; SRDS, September 1981; ANM Circulation '81/'82.

[1] All daily newspapers with at least .05 ratio of circulation to households, or more than 25,000 circulation in the SMSA.

A Few Common Newspaper Terms

Agate line:	The traditional newspaper space measurement, one column wide and one-fourteenth of an inch deep. Depending on column width, a broadsheet newspaper page may range from about 1800 to about 2800 lines.
Broadsheet newspaper:	A "standard" or large-size newspaper. The measurements of broadsheet newspapers vary, but a page 13½" wide and 21½" deep is fairly typical.
Circulation:	The number of copies sold or distributed. For the more than 90% of weekday circulation audited by the Audit Bureau of circulation, the term always denotes paid circulation, usually the average over a 12-month period.
Column inch:	Space measurement favored by local advertisers, one column wide and one inch deep.
Double-truck:	Two facing pages used for a single unbroken advertisement. Also called a two-page spread.
Newsprint:	The uncoated, machine-finished paper on which newspapers are printed.
ROP:	Originally, ROP (or "run-of-paper") denoted an advertisement position anywhere in a newspaper (as opposed to a preferred position). Now ROP is generally used to denote ads that appear in the newspaper itself (as opposed to preprints or inserts).
Scotch double-truck:	A single unbroken advertisement on two facing pages, bordered by one full column of editorial on each of its vertical sides and by shallow columns of editorial across the top.
Tabloid:	A newspaper about half the page size of a broadsheet. A fairly typical tabloid might be about 10" wide and 14½" deep.

Information, Please: Who To Call At NAB

Ad Readership	Stu Tolley	557-1817
Advertising Expenditures	Jim Conaghan	557-5482
Advertising Rates	Jim Conaghan	557-5482
Automotive Sales	Val Corradi	(313) 642-9200
CAN DO	Susan Lorenzana	557-1896
Co-op Sales	Frank Hennessey	(312) 644-1290
Coupon Information	John Kelley	557-1811
Food	Dick Neale	557-1843
Information Center	Ann Brady	557-1822/3
Inserts, preprints	Jack Aldinger, Ted Knecht	557-1847/8
Marketing Services	Uldis Grava	557-1854
National Sales	Mac Morris	557-1865
Newspaper Circulation	Jim Conaghan	557-5482
Newspaper Readership	Chuck Lehman	557-1806
NEWSPLAN	Mac Morris	557-1865
New Technology	Charles Kinsolving	557-1850
One-Order/One-Bill	Jack Aldinger, Ted Knecht	557-1847/8
Public Relations	Jim Dunaway	557-1828
Real Estate Classified	Tony Marsella	557-1836
Recruitment advertising	Ira Gordon	557-1862
Retailing	Alfred Eisenpreis	557-1856
SAUs (Standard Adv. Units)	Charles Kinsolving	557-1850
SMRB Data	Chuck Lehman	557-1806
Survey Research	Chuck Lehman	557-1806
Total Market Coverage	Jack Aldinger	557-1847

(Unless otherwise specified, area code is 212.)

How Much Do People Spend To Read Daily and Sunday Newspapers?

Estimates of Annual Expenditures in the United States
(In thousands of dollars)

	Annual Expenditures			Single Copy Price[1]	
	Weekday	Sunday	Total	Weekday	Sunday
1972	2,138,653	790,850	2,929,233	10¢	25¢
1973	2,206,430	831,390	3,037,820	10	25
1974	2,641,020	940,713	3,581,733	15	25
1975	2,886,978	1,034,537	3,921,515	15	25
1976	2,973,894	1,113,409	4,087,303	15	35
1977	3,129,901	1,180,335	4,310,236	15	35
1978	3,289,526	1,245,253	4,534,779	15	35
1979	3,519,008	1,431,534	4,950,542	15	50
1980	3,863,822	1,605,767	5,469,589	20	50
1981	4,359,244	1,846,897	6,206,141	25	50

[1] Average (modal) price. Source: ANPA

Source: Estimate by NAB, based on information from SRDS; Editor and Publisher Yearbook; ABC; CARD.

For morning, evening and Sunday/weekend editions, newspaper reach is fairly constant throughout the year:

Index of Month-by-Month Newspaper Circulation[1]

	J	F	M	A	M	J	J	A	S	O	N	D
AM	101	101	101	101	100	99	97	98	99	101	101	100
PM	99	100	100	100	100	100	99	99	100	101	101	101
S/W	100	101	101	101	100	99	98	98	100	101	101	100

Source: Media General, Inc. survey of ICMA members. Data cover the years 1976-1980 and are weighted by circulation size and geographic region to represent national totals.

[1] Average month circulation=100.

Index of daily newspaper reach varies little throughout the week.

	Monday	Tuesday	Wednesday	Thursday	Friday
Readership by adults	95	98	103	103	101

Source: Audits and Surveys, Inc., 1977.

Most newspaper readers are subscribers.

How Newspapers Read Were Obtained

	Weekday Editions	Sun/Weekend Editions
Subscribe, home delivery	77%	71%
Bought	15	22
Obtained otherwise	8	7

Source: Response Analysis Corporation, 1979.

Number & Circulation Of Daily & Sunday Newspapers In The United States

Year	Morning	Evening	All Day	Total	Tot.Morn.[1]	Tot.Evng.[1]	Tot. Daily	Number	Tot.Sunday
Year	Morning	Evening	All Day	Total	Circ.(000)	Circ.(000)	Circ.(000)	Sunday	Circ.(000)
1971	324	1,410	15	1,749	26,116	36,115	62,231	590	49,665
1972	320	1,424	17	1,761	26,078	36,432	62,510	605	50,001
1973	323	1,431	20	1,774	26,524	36,623	63,147	634	51,717
1974	319	1,428	21	1,768	26,145	35,732	61,887	641	51,679
1975	320	1,417	19	1,756	25,490	35,165	60,655	639	51,096
1976	327	1,416	19	1,762	25,858	35,119	60,977	650	51,565
1977	326	1,406	21	1,753	26,742	34,753	61,495	668	52,429
1978	337	1,401	18	1,756	27,657	34,333	61,990	696	53,990
1979	358	1,381	24	1,763	28,575	33,648	62,223	720	54,380
1980	357	1,358	30	1,745	29,414	32,788	62,204	735	54,672
1981	378	1,322	30	1,730	30,552	30,878	61,431	755	55,180

[1] Circulation of all-day newspapers is apportioned between morning and evening editions.

Source: Editor and Publisher.

The number of daily newspapers has remained fairly steady over the last 10 years, along with daily circulation. There has been a shift, though, toward morning papers, with their number increasing by 54 in the last 10 years while the number of evening papers has decreased by 88. Morning papers, which 10 years ago accounted for 42% of daily circulation, now account for 50%. Another phenomenon has been the increase in all-day newspapers, which have increased from 15 in 1971 to 30 in 1981.

The greatest growth since 1971 has been achieved in the area of Sunday editions. Their number has increased 28%, with the total circulation increasing by 11%. This reflects the fact that medium-size and smaller papers have been initiating new Sunday editions.

Daily Newspaper Audience
(Average Weekday)

	Number (in 000's)	Percent of Total Adults
Total Adults	108,366	67%
By Sex:		
Men	52,399	69%
Women	55,967	66
By Age:		
18-24 years	16,675	59%
25-34 years	23,158	61
35-44 years	18,064	69
45-54 years	17,201	76
55-64 years	16,349	75
65 years or older	16,919	69
By Education:		
Grammar school or less	11,537	51%
Some high school	14,273	61
High school graduate	44,024	69
Some college	19,190	71
College graduate	19,342	78
By Household Income:		
$40,000 or more	18,301	78%
$30,000 or more	35,679	77
$25,000 or more	47,965	75
$20,00-$24,999	14,251	70
$15,000-$19,999	12,275	67
$10,000-$14,999	16,840	64
Under $10,000	17,035	52
By Occupation:		
Professional, technical	13,679	76%
Manager, administrator	9,220	77
Clerical, sales	16,655	69
Craftsman, foreman	8,238	65
Other employed	19,244	62
Not employed	41,330	65

Source: Simmons Market Research Bureau, 1982.

Sunday/Weekend Newspaper Audience
(Average Sunday/Weekend)

	Number (in 000's)	Percent of Total Adults
Total Adults	107,706	67%
By Sex:		
Men	51,043	67%
Women	56,663	66
By Age:		
18-24 years	18,210	64%
25-34 years	24,308	64
35-44 years	17,892	68
45-54 years	16,615	74
55-64 years	15,440	71
65 years or older	15,241	62
By Education:		
Grammar school or less	10,573	47%
Some high school	13,635	58
High school graduate	44,024	69
Some college	19,688	73
College graduate	19,786	80
By Household Income:		
$40,000 or more	18,703	80%
$30,000 or more	36,440	78
$25,000 or more	49,205	77
$20,000-$24,999	14,214	70
$15,000-$19,999	12,063	66
$10,000-$14,999	16,191	62
Under $10,000	16,033	49
By Occupation:		
Professional, technical	13,874	77%
Manager, administrator	9,289	78
Clerical, sales	17,602	73
Craftsman, foreman	8,273	65
Other employed	19,000	62
Not employed	39,668	62

Source: Simmons Market Research Bureau, 1982.

Readers-Per-Copy Estimates

	Daily	Sunday/Weekend
Adults	2.1	2.2
Men	1.0	1.1
Women	1.1	1.1

Source: Estimate by Newspaper Advertising Bureau, 1981, based on Simmons Market Research Bureau, 1981; Editor & Publisher Yearbook, 1981; and ANM Circulation, '81/'82.

Average Weekday Use of Three Major News Sources

	% Adults 18+ News Exposure
Daily newspaper	69%
TV news	62
Radio news	49

Source: Audits and Surveys, Inc., 1977.

Average Weekday Coverage of Professionals and Managers

Total professionals & managers	77%
Individual employment income of $35,000 & over	84%
College graduate	81
Employed in business services	80

Source: Simmons Market Research Bureau, 1981.

Cumulative Net Reach of the Daily Newspaper Over Five Weekdays
(Total U.S., by Selected Demographics)

	One Day	Two Days	Three Days	Four Days	Five Days
Total Adults:					
Reach	68%	79%	84%	87%	89%
Avg. Frequency	1.0	1.7	2.4	3.1	3.8
GRP's*	80	160	240	320	400
Total Men:					
Reach	69%	80%	85%	87%	89%
Avg. Frequency	1.0	1.7	2.4	3.2	3.9
GRP's	83	166	249	332	415
Total Women:					
Reach	67%	78%	83%	86%	88%
Avg. Frequency	1.0	1.7	2.4	3.1	3.8
GRP's	78	156	234	312	390
Adults, Age 35-44:					
Reach	71%	82%	87%	90%	91%
Avg. Frequency	1.0	1.7	2.4	3.2	3.9
GRP's	84	168	252	336	420
Adults, College Graduate:					
Reach	79%	90%	93%	95%	97%
Avg. Frequency	1.0	1.8	2.5	3.3	4.1
GRP's	98	196	294	392	490
Adults, HH Income $35,000 and over:					
Reach	79%	90%	94%	96%	97%
Avg. Frequency	1.0	1.8	2.5	3.3	4.1
GRP's	99	198	297	396	495
Adults, Professional & Technical Workers:					
Reach	78%	88%	92%	94%	95%
Avg. Frequency	1.0	1.8	2.5	3.3	4.1
GRP's	95	190	285	380	475

*GRP's=Gross Rating Points (number of impressions per 100 adults).

Source: Simmons Market Research Bureau, 1981.

Types of Daily Newspaper Pages or Sections Usually Read

	Percent of Weekday Audience		
	Adults	Men	Women
Usually read every page	62%	61%	62%
Read certain pages or sections	38	39	38
Business, finance	77	78	75
Comics	77	77	76
Editorial page	80	77	81
Food, cooking	79	70	86
General news	94	93	95
Home furnishings, improvement	77	71	82
Sports	81	88	74
TV, radio listings	79	75	81
	(107,944)	(51,703)	(56,242)

Projected base: Average weekday audience (in 000's).

Source: Simmons Market Research Bureau, 1981.

NOTE: For each type of page or section shown in table, percent who report that they usually read "every" page has been added to those specifically reporting readership. Because of the way in which this question was asked, these data might be regarded as "page opening" rather than readership figures. Data from Admar Research (1979) indicate that the average newspaper page on which display advertising appears is opened by 86% of the issue readers.

Data Regularly Distributed By Media Analysis Unit Of The Research Department

Cities in the U.S. with two or more newspapers.

Cumulative circulation and rates of daily newspapers in 300 metropolitan markets necessary to obtain minimum 60% household coverage in each market.

Cumulative circulation and rates of Sunday newspapers in top 300 metropolitan markets necessary to obtain minimun 60% household coverage in each market.

Daily newspapers in top 300 metropolitan markets: households, coverage, circulation, open line rate, cost of 1,000 lines, full page, and 20,000 lines.

Daily and Sunday newspapers with zone edition.

Daily newspapers in top 300 metropolitan markets, ROP color edition.

How much do people spend to read daily and Sunday newspapers, 1945-present.

Media breakdown of U.S. agencies billing $30 million or more.

National advertising expenditures in major media by classification.

Newspaper advertising expenditures.

Newspaper groups--daily--top 300 metropolitan markets.

Newspaper groups--Sunday--top 300 metropolitan markets.

Newspapers in U.S. not accepting beer, wine or liquor advertising.

Newspapers not offering a 2% cash discount.

ROP color premium in top 300 metro markets for 1,000 lines and full page (breakdown by 100 markets--1, 2, and 3 color).

Sunday newspapers in top 300 metro markets: households, coverage, etc.

Total advertising volume in the U.S.--1935 to present--(McCann-Erickson estimates).

U.S. Daily and Sunday newspapers--1945 to present--number and circulation.

Please contact: Economic and Media Analysis Unit (212) 557-1827.

NAB Research Reports

	Member Prices	Non-Member Prices
AD READERSHIP		
Air Travel Study (1981)	$ 4.75	$ 25.00
Color in Newspaper Advertising: Is It Worth the Money? (1974)	1.50	9.00
A Comparison of the Readership of 7- vs. 8-Column National Ads (1972)	1.50	9.00
Creative Variables and Ad Readership (1975)	2.00	10.00
Do Corporate Ads Get Read? Evidence from a Follow-up Study in 5 Cities (1980)	1.75	8.00
Does Corporate Advertising Get Read? (1980)	1.00	6.00
Editorial Context: Readership of Men's Interest Ads (Tires) on Sports Pages vs. General News Pages (1972)	1.00	5.00
The Effects of Placing Ads for the Same Product Category on the Same Page: A Field Experiment (1976)	3.00	15.00
An Evaluation of Changes in Ad Readership Over Time, and Technical Appendix (1972)	2.00	10.00
How Newspaper Ads Select Customers (1980)	2/1.00	5.00
Norms for the Readership of National Ads and an Analysis of the Readership Effects of Ad Size (1972)	1.00	5.00
Readership of Coupon vs. No-Coupon Ads (1974)	1.00	5.00
Readership of Small Space National Ads in Newspapers (1968)	1.00	5.00
Reliability of Individaul Starch Ad Scores (1972)	1.00	6.00
Research Facts on Position, Timing and Creativity in Newspaper Advertising (1976)	1.50	8.00
Retail Inserts in Daily Newspapers: A Four-Market Readership Study (1976)	2.50	15.00
A Study of Blacks in Newspaper Ads (1976)	2.00	12.00
A Summary of Research on the Form of Advertising: Layout, Type-Size, Typefaces, Forms of Copy (1971)	1.00	5.00
Yardstick of Accumulative Newspaper Ad Readership	2/1.00	5.00

NAB Research Reports (continued)

	Member Prices	Non-Member Prices
CLASSIFIED ADVERTISING		
Classified Advertising: Readership and Use Among Purchasers of General Merchandise and Recreation and Leisure Items (1975)	$ 2.00	$ 10.00
An Eight-Market Study of Recent New Home Buyers (1978)	2.75	14.00
Help Wanted Advertising: A National Mail Survey of New Job Holders (1977)	2.50	13.00
A National Study of Classified Advertising Readership and Prospect Status (1980)	3.00	18.00
A Pilot Study of Classified Advertising Managers' Opinions About the Operations and Prospects of Classified Advertising (1977)	1.50	7.00
Principles for Writing Effective Classified Ads for Private Homes (1968)	2.00	10.00
Which Ad Pulled Better? Employment Classified Ads (1974)	1.00	10.00
COMPETITIVE MEDIA		
The Believability of Advertising in Five Media: Results from a Recent Nationwide Survey (1981)	$ 2.00	$ 11.00
A Comparative Study of Dailies and Community Weeklies in the St. Louis Metropolitan Area (1973)	2.00	10.00
Dailies, Shoppers and Pennysavers: A Four-Market Study of Readership and Attitudes (1978)	3.00	15.00
Direct Mail (1977)	2.00	10.00
Newspapers and Direct Mail: A Study of Advertising Believability (1982)	.50	3.50
A Pilot Study of Relative Effectiveness of Different Media Mixes in Launching a Motion Picture (1975)	1.50	8.00
A Three-City Survey of Recall of Outdoor Advertising (1976)	1.50	9.00
Trends in TV Commercial Recall, 1965-1981: A Report on Three Surveys of Prime-Time Network Viewers (1981)	2.50	15.00

NAB Research Reports (continued)

	Member Prices	Non-Member Prices
MISCELLANEOUS RESEARCH REPORTS		
A Five-Market Telephone Survey of "Big Ticket" Purchases (1976)	$ 1.00	$ 5.50
Key Facts About Newspapers and Advertising (1982)	1.50	7.00
The Young Homemakers (1974)	4.00	20.00
Women, Work and Markets of the 80's (1979)	4.50	25.00
NEWSPAPER READERSHIP		
Average Weekday and Average Sunday/Weekend Newspaper Coverage of Product and Service Users (1982)	3.00	15.00
1981 Daily Newspaper Readership Demographic Tables for Total U.S. and Top 100 Metros (SMRB) (1981)	3.00	15.00
1981 Sunday/Weekend Newspaper Readership Demographic Tables for Total U.S. and Top 100 Metros (SMRB) (1981)	3.00	15.00
Daily Newspaper: Twelve-Issue Reach and Frequency Tables (SMRB) (1981)	2.00	12.00
Local Newspaper Audiences--Seventh Edition, 1979 (1979)	15.00	100.00
A National Survey of the Content and Readership of the American Newspaper (1972)	2.00	12.00
Newspaper Net Reach Estimator	1.00	5.00
The Readership of Newspaper Pages and Sections: Demographic Breakdowns (SMRB) (1982)	1.50	10.00

NAB Research Reports (continued)

REPORTS ON SPECIFIC PRODUCTS AND SERVICES	Member Prices	Non-Member Prices
Air Travel Study (1981)	$ 4.75	$ 25.00
Automotive Aftermarket Study (1974)	2.00	10.00
1980 Automotive Study: Car Buying Plans and Attitudes of Recent New Car Buyers (1980)	4.75	24.00
Average Weekday and Average Sunday/Weekend Newspaper Coverage of Product and Service Users (1982)	3.00	15.00
Beer Brand Awareness, TV Viewing and Daily Newspaper Readership Among Male Beer Drinkers (1976)	2.00	10.00
Books and Leisure Time (1974)	2.00	10.00
Business Air Travel Decisions (1975)	2.00	10.00
Eat and Run: A National Survey of Fast Food Patronage (1978)	3.00	20.00
The Emerging New Food Shopper (1982)	2.50	15.00
Food Shopping and Eating Patterns (1978)	6.00	35.00
A Four-Market Survey of Financial Service Users (1977)	3.00	16.00
Movie Going and Leisure Time (1974)	2.00	10.00
Movie Going in the United States and Canada (1981)	2.50	13.00
The New American Home (1981)	2.50	15.00
1980 Post-Election Automotive Study (1981)	5.00	25.00
Shoppers On The Move (1975)	2/1.00	10.00
Shoppers On The Move: Eating an Evening Meal in a Restaurant (1975)	1.00	10.00
Sunday Travel Sections and Vacation Travel Prospects: An Eight-Market Study (1980)	4.50	30.00
Supermarket Shoppers' Reactions to Future Possibilities (1980)	6.75	40.00

NAB Research Reports (continued)

	Member Prices	Non-Member Prices
REPORTS ON SPECIFIC PRODUCTS AND SERVICES (continued)		
A Three-City Study of Beer Drinking and Lifestyle (1973)	$ 2.00	$ 10.00
Travel and Leisure Time (1974)	2.00	10.00
Wine Drinking and Lifestyle--A Three-City Survey (1973)	2.00	10.00
Women and Car Buying (1979)	3.00	16.00
Young Men and New Cars Revisited (1974)	2.00	10.00
Young Singles and Vacation Travel (1978)	2.75	15.00
RETAIL		
The Double Dividend: A Study of How Advertising Works for Department and Discount Stores (1977)	$ 2.50	$ 14.00
Eat and Run: A National Survey of Fast Food Patronage (1978)	3.00	20.00
The Emerging New Food Shopper (1982)	3.50	20.00
Food Shopping and Eating Patterns (1978)	6.00	35.00
The Future of Retailing (1973)	1.00	6.00
The New American Home (1981)	2.50	15.00
The Newspaper Advertising Bureau's UPC Databank--A Preliminary Look (1976)	.50	3.00
Retail Inserts in Daily Newspapers: A Four-Market Readership Study (1976)	2.50	10.00
Shoppers On The Move (1975)	2/1.00	10.00
Shoppers On The Move: Eating an Evening Meal in a Restaurant (1975)	1.00	10.00
Supermarket Ads Move Merchandise (1981)	4/1.00	10.00
Supermarket Shoppers' Reactions to Future Possibilities (1980)	6.75	40.00
Women and Fashion: 1981 Study of Clothes Buying Attitudes and Behavior (1981)	4.50	25.00

NAB Research Reports (continued)

	Member Prices	Non-Member Prices
SALES EFFECTS OF ADVERTISING		
Color in Newspaper Advertising: Is It Worth the Money? (1974)	$ 1.50	$ 9.00
Coupon Facts: Findings on Cents-Off Coupon Usage and Users (1982)	2.00	10.00
The Double Divident: A Study of How Advertising Works for Department and Discount Stores (1977)	2.50	14.00
The Newspaper Advertising Bureau's UPC Databank--A Preliminary Look (1976)	.50	3.00
A Pilot Study of Relative Effectiveness of Different Media Mixes in Launching a Motion Picture (1975)	1.50	8.00
The Sales Effects of National Newspaper Advertising for Two Package Goods Products (1978)	1.50	8.00
Supermarket Ads Move Merchandise (1981)	4/1.00	5.00
RESEARCH NOTES		
No. 1--A Second Look at CPM's: Column Width and SAU's (1982)	.50	2.50
No. 2--Daily Newspaper Coverage of People in High-Level Occupations (1982)	.50	2.50
No. 3--The Uses of Readers-Per-Copy Estimates (1982)	.50	2.50
No. 4--Television Program Listings: Newspapers vs. TV [illegible] (1982)	.50	2.50
No. 5--Moviegoers Assess Th[illegible] Movie Theatres (1982)	.50	2.50

NOTE: In some cases the same research study is listed under two categories.

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5/83

Research Report

FOOD SHOPPING IN
ONE-PERSON HOUSEHOLDS

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

BEST AVAILABLE COPY

FOOD SHOPPING IN
ONE-PERSON HOUSEHOLDS

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the Newspaper business and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

March, 1983

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STUDY HIGHLIGHTS

One-person households now make up nearly a quarter of the U.S. household population and are increasing faster than any other household size.

People living alone pay more than twice the per capita food costs of four-person households and the trend is toward a widening gap.

The explanation of the food expenditure gap between one- and multi-person households appears to have several sources:

--Food stores package more for multi-member households than for one-person households.

--One-person households place greater importance than multi-person households on ease of preparation of food and less on nutrition and cost.

--One-person households are less likely than multi-person households to consider cheaper generic brands a good value.

--One-person households tend to purchase more costly convenience foods such as frozen main courses.

--One-person households are less likely than multi-person households to comparison shop between and within stores.

--While people living alone use cents-off coupons, they are not as likely as multi-person households to be heavy users.

--Yet, one-person householders do make shopping lists as frequently as multi-person householders do, so they are not careless shoppers.

--One-person householders are only slightly less likely than multi-person householders to read newspapers, look at newspaper food advertisements, and as likely to get their cents-off coupons from newspapers.

--Conclusions and implications for the food industry and newspapers are made.

One-Person Households and Food Shopping

Introduction

The typical food shopper is a family member (usually the wife) who is shopping for the entire family. However, some demographic changes have been taking place in the past few decades that are modifying the food shopper picture. One of the most noteworthy of these changes is the rapidly growing number of one-person households.

In 1980 there were more than 82 million households in this country, according to the U.S. Census Bureau. In the mid-1950s, one-person households began growing more rapidly than any other household type, recording a 263 percent gain from 1955 to 1980, while the total number of households increased by 72 percent. In 1955, one-person households were 11 percent of all households, and in 1980, they were 23 percent. In the past decade alone, they increased by 64 percent.

The highest concentration of one-person households is not in California, as one might suspect, but the New York City metropolitan area. Slightly over 30 percent of New York City metropolitan households are one-person households.

The trend is clearly toward more one-person households, and as they grow in numbers, they will claim more attention and impact in the society and marketplace. Using data from a recent study by the Newspaper Advertising Bureau ("The Emerging New Food Shopper," 1982), the present study found that one-person householders have some distinctive preferences and patterns that may reshape marketing approaches in some areas of food and food shopping. While some of their food and food shopping habits are similar to multi-member households, some are markedly different, particularly in how much they pay for food, what is important in food, and how they shop.

How the Study was Done

In the Spring of 1982, Hayes, Nedved, and Associates conducted a telephone survey of 558 main food shoppers for the Newspaper Advertising Bureau. While not a strict probability sample, the resulting sample was similar on a variety of characteristics to sample norms accumulated by the Hayes, Nedved, and Associates organization in other food store studies. Approximately 50 interviews were completed in 11 cities across the U.S.A. Half of the sample were regular customers of these stores.

Secondary data on household food costs were derived from Gallup Polls. Data on food purchases came from Simmons Market Research Bureau.

One-Person Households Spend More on Food

There is a dramatic difference in the amount one-person households in nonfarm areas spend on food each week and the per person amount spent in multi-person households. The median weekly food costs for one-person households was $30.67 over the 1977-1982 period, compared to about half that amount ($16.83) spent per person in four-person households (See Table 1.)[1] Naturally, costs have risen, across the board.

Table 1. Per-Person Weekly Food Costs by Household Size, 1977-1982

Household Size	Average	Per-Person Weekly Food Costs 1982	1978	1977
One	$30.67	$43.00	$26.00	$23.00
Two	23.33	28.00	22.00	20.00
Three	18.56	24.67	16.67	14.33
Four	16.83	20.00	15.00	15.50
Average	$22.35	$28.92	$19.92	$18.21

Source: Gallup Polls

Why the Big Difference in Food Cost?

Why do one-person households pay more per-person for food than multi-person households? Several reasons are suggested. One explanation lies with the common practice among food stores of

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1) The joint distribution of food costs by household size and by year suggests that the average may be more stable than specific year-by-year comparisons.

packaging with multi-member households in mind, who are, of course, still their most typical customer. Packaging in small quantities costs more in the long run, when it is even available in stores. While there is no direct evidence to support the claim, it is also likely that one-person households have higher rates of food spoilage, since they must often buy in larger quantities than they can use for a single meal.[2]

Other explanations for the food cost differences between one and multi-person households derive from the NAB survey, which found significant differences between one-person and multi-person households in the way they shop and what they consider important in food they buy.

What is Important in Food

Like anything that is as vital as food, people have differing ideas of what is important to look for in food. This can affect not only the quality of food purchased, but the cost as well, and sometimes the two are not linked in a simple formula of "the greater the quality, the higher the price."

---

2) The Gallup Poll question about food costs is ambiguous since it did not specify food consumed at home or outside of the home. If respondents included out-of-home food expenditures, then the greater likelihood of one-person householders to eat commercially prepared meals would have to be considered a part of the food cost difference between one and multi-person householders. See "Meal Consumption Behavior," National Restaurant Association, Washington, D.C., 1981 for details on meal consumption by household size.

Table 2 presents the average rank of importance food shoppers gave to four things that people often look for in food: taste, nutrition, cost, and ease of preparation. While each household category ranked these four in the same order, there were differences in how much importance a particular food attribute was given.

Table 2. Average Rank of Importance of Food Characteristics by Household Size

Importance of:	Multi-person households	One-person households	One-person households under 65 yrs. old	One-person households over 65 yrs. old
Taste	1.92	1.92	1.68	2.14
Nutrition	1.93	2.23	2.48	2.00
Cost	2.55	2.76	2.74	2.77
Preparation ease	3.58	3.07	3.05	3.09

According to the results in Table 2, one-person householders rank nutrition and cost lower than multi-person householders do. These differences between one- and multi-person households are statistically significant. One-person householders who are under 65 years old are especially prone to consider nutrition less important than others do. Furthermore, younger one-person householders rank taste of food considerably higher than others, both multi-person householders and those single people over 65. One-person householders, whether under or over 65 years old, place greater importance on the ease with which food can be prepared and less importance on cost than multi-person households do. These findings imply that one-person households are less price conscious and more given to food purchases that cater to taste (especially among singles under 65) and convenience than are shoppers from multi-person households.

One-person householders also appear to pay more for food because of the way they shop and the kinds of food they buy. Additional evidence from 1981 Simmons Market Research Bureau data strongly suggests that one-person household consumers (female only) more often buy foods that are easy and quick to prepare. Frozen and instant foods are typical of these types of food. As Table 3 indicates, one-person households were more likely than two-person households (40% to 35%) to have purchased frozen complete dinners (TV dinners) "in the last 30 days," and very nearly as often as three or more person households. Percent differences are small, but it must be noted that the greater number of people to feed in multi-person households makes it more likely that they would have purchased the particular products in the last thirty days.

Table 3. Products Purchased in the Last Thirty Days by Household Size (Female Homemakers)

Household Size	TV Dinners	Frozen Main Courses	Frozen Desserts	Canned Stews	Instant Coffee
1 person	40%	38%	40%	6%	41%
2 persons	35%	32%	44%	3%	40%
3-4 persons	41%	35%	48%	8%	39%
5 or more persons	41%	34%	45%	7%	44%

Source: Simmons Market Research Bureau, 1981

The point is made more clearly when frozen main courses purchased in the last thirty days are considered. These frozen main course items are usually better in quality and more costly than TV dinners, and Table 3 shows that more one-person households purchased frozen main courses than any other household size category. One-person households also more often purchased canned stews than two-person households, while buying frozen desserts slightly less often and instant coffee about as often as two-person households. For these latter two products, another way of looking at the issue is to note that one-person householders bake from scratch less often than two-person household homemakers (60% to 71%) and use ground coffee less often as well (41% to 53%).

These data offer further evidence that one-person householders often prefer convenience of preparation, and are willing to pay the price for it, particularly when the convenience foods are also the better tasting foods.

There are likely to be age differences in food purchases among the one-person households. Although the sample is too small to determine these differences, looking just at age differences for all household sizes reveals a difference of 10 percentage points between the 18-34 age group and the 65 and older age group on use of frozen main courses (37% to 27%). The NAB survey sample was comparable to census data on the percent of householders that were 65 years old or older (20%).

Differences in Shopping Patterns

One-person householders also pay more for food because of the way they shop. They take less time to comparison shop within and between stores, and they are less likely to take advantage of sales at different stores.

In Table 4, data from the NAB survey show that multiple-person households are more likely to use a third store than one person households (a statistically significant difference).

Table 4. Use of a Third Store by Household Size

	Use a Third Store		
Household Size	Yes	No	(N)
1 person	16%	84%	(82)*
2 or more persons	37%	63%	(426)*

* Respondents giving no answers were excluded from N's in this and all tables that follow.

One-person household shoppers also make fewer trips for sales and bargains (Table 5). Eighty percent of those in one-person households did not make extra trips for sales and bargains. This compares with two-thirds of those in multi-person households. This difference is also statistically significant.

Table 5. Make Extra Trips for Sales and Bargains by Household Size

	Make Extra Trips		
Household Size	Yes	No	(N)
1 person	20%	80%	(86)
2 or more persons	34%	66%	(464)

Given this pattern of store loyalty and less likelihood of being "cherry pickers" among stores, we would be led to suspect that one-person householders would not use cents-off coupons. This is not the case. There is no difference statistically between household sizes on any coupon use. However, there is a considerable relationship (statistically significant) between household size and heavy coupon use (5 or more per week). Table 6 shows that 38 percent of the multi-person household shoppers were heavy coupon users, while 13 percent of the one-person householders redeemed five or more coupons.

Table 6. Heavy Coupon Use by Household Size

	Used 5 or More Coupons		
Household Size	Yes	No	(N)
1 person	13%	87%	(68)
2 or more persons	38%	62%	(359)

One-person household shoppers are also less likely to consider generic or "no frill" foods a good value (Table 7). Thirty-seven percent of the one-person householders regard generics as a good value, compared to 50 percent of the multi-person households (statistically significant). What is most interesting about these data is that one-person households are more likely to report that their stores do not have generics or that they are not aware if generics are a good value or not (45% to 32%). This represents a key opportunity for the food industry to inform people living alone about generic foods. Nearly one half are uninformed about generic brands!

Table 7. Generic Foods as a Good Value by Household Size

Household Size	Yes	No	Don't Have or Don't Know	(N)
1 person	37%	18%	45%	(89)
2 or more persons	50%	18%	32%	(467)

There have been some indications in the findings so far that one-person householders are unsystematic and predominantly convenience shoppers. However, the NAB survey found that this is not the complete story. There is, in fact, no statistically significant difference between one-person and multi-person households on the use of shopping lists in the food shopping process. Furthermore, there are indications that one-person householders are as conscientious about shopping information in newspapers as are multi-person householders.

Use of Newspapers in Food Shopping

While there were significant differences between one-person and multi-person households on food use and shopping patterns, there were not statistically significant differences between household size and readership of newspapers or newspaper food advertisements. This set of findings appears to offer an especially attractive opportunity of reaching a large market that has some special needs and shopping patterns.

A majority in both one-person and multi-person households reported they often read a daily newspaper in the past seven days. Seventy-nine percent of the one-person and 86 percent of the multi-person households reported reading in the past seven days (Table 8). The difference is not statistically significant. The national figure for past week readership is 80 percent, according to a survey completed about the same time by the Newspaper Advertising Bureau.

Table 8. Daily Newspaper Readership by Household Size

	Read a Newspaper in Past 7 Days		
Household Size	Yes	No	(N)
1 person	79%	21%	(89)
2 or more persons	86%	14%	(467)

Almost as many one-person households as multi-person households check food advertisements in newspapers (Table 9). Half of the one-person and 57 percent of the households with two or more people checked food advertisements in daily newspapers before making their last main food shopping trip. The difference is again statistically insignificant. Similar results were found when food advertisements in weekly newspapers were considered.

Table 9. Checking Newspaper Food Advertisements in Daily Papers by Household Size

	Checked Newspaper Food Ads		
Household Size	Yes	No	(N)
1 person	50%	50%	(88)
2 or more persons	57%	43%	(464)

Finally, almost everyone, whether from a one-person household or not, get their cents-off coupons from newspapers (Table 10). Eighty-seven percent of the one-person and eighty-nine percent of the multi-person households usually get their coupons from newspapers.

Table 10. Source of Cents-off Coupons by Household Size

	Source of Coupons*				
Household Size	Newspapers	Mail	Magazines	Other	(N)
1 person	87%	2%	3%	8%	(63)
2 or more persons	89%	8%	1%	2%	(355)

* Only those who use coupons were asked the source.

Summary and Conclusions

The rapid growth of large numbers of people living alone warrants special attention. Nearly a quarter of the U.S. households are now one-person households and the proportion is growing rapidly.

In this study, one-person households were paying about twice the amount for food that four-person households were paying on a per person basis. The reasons for this discrepancy appears to be due to one-person householders' greater preferences for convenience of preparation of food, while giving less importance to nutrition and cost than multi-person households do. Part of the explanation may be found in the way food stores package food, primarily for larger households.

The manner in which one-person householders shop for food may also affect their costs. They are less likely to shop around from store to store for sales and bargains. They are less likely to be heavy coupon users, although they are just as likely as multi-person households to use cents-off coupons. Nor do they place high value on generic brands of food, although this appears to be because they either do not know about generics, or their stores do not carry generics.

Yet, one-person householders' patterns seem to be due more to the inconvenience and lack of motivation of cooking for one person and the lack of shopping sophistication than to careless intentions or a spendthrift mentality. One-person households are almost as likely as multi-person households to make shopping lists, read newspapers, look at newspaper food advertisements, use coupons, and get coupons mainly from newspapers.

What appears to be called for, in order to reach this growing segment of the population, is more attention to their food needs, especially in packaging, and attempts to improve their food and shopping sophistication. Newspapers are clearly the medium in which to place such efforts, since newspapers are an important source of food related information for one-person households.

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Research Report

NATIONAL STUDY OF DIRECT MAIL

An Inventory of Household Mail and How it is Treated

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

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NATIONAL STUDY OF DIRECT MAIL

An Inventory of Household Mail and How it is Treated

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper business and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

March 1983

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INTRODUCTION

Direct mail advertising has grown rapidly in recent years, in part due to computer capability for generating mailing lists and to favorable postal rates introduced in 1979. Yet direct mail is probably the least measured and documented of all the major advertising media.

The present study was therefore undertaken by the Newspaper Advertising Bureau to obtain an up-to-date national picture of the following:

- An inventory of the direct mail advertising received in households across the nation;
- How advertising mail is treated;
- How consumers feel about direct mail and newspaper advertising.

Method and Sample

The study covered a national probability sample of over 700 households, in October, 1982. Two telephone interviews were conducted with the first adult to look over the mail. (78% were women.) In the first interview they were asked about the usual household mail, how they usually handle it, and their attitudes toward direct mail and newspaper advertising. Respondents were asked to hold the next day's mail for a call-back interview at an agreed-on time the next day.

In the call-back interview respondents reported how much mail was received that day, and gave a detailed description of the day's advertising mail and how each piece was treated. They were then asked to send in all the mail which they did not wish to keep. (A postage paid return envelope, addressed to the research firm, had been sent to them with a cover letter and a new $2.00 bill, thanking them for their cooperation.)

The sample for this study comprises the following:

Respondents: 756 completed first interview
616 completed call-back interview

Ad mail: 1057 pieces described in call-back interview
605 pieces sent in

The field work and tabulation were conducted by Henry Senft Associates. (See Technical Appendix.) This report was written by Thelma Anderson of NAB's Research Department.

HIGHLIGHTS

Volume of Ad Mail

- Telephone interviews with the first person to look at the mail in households across the nation in October, 1982, indicates that ad mail is pervasive and now exceeds the amount of personal mail.

- Almost every household receives ad mail at least once a week. 30% said almost every day, 39% said several times a week, and 25% said once a week.

- On the day of the second interview 8 out of 10 households received mail and 84% of these deliveries contained ad mail. This is 66% of all households. 58% of all households received non-ad mail. The average number of pieces of non-ad mail was 1.4 per total households.

- Excluding the pre-election political candidate mail, the average number of pieces of advertising and promotional material was 1.6 per day. This far exceeds the 1974 U.S. Postal Service study figure of 2.6 pieces per week reported by the Direct Mail Association in its 1982 Fact Book. Clearly the favorable postage rate change of 1979, and the generous weight allowance, has generated an enormous increase in household ad mail since 1974.

- Although ad mail is very widespread, high income households, which are more likely than low income households to receive personal mail, are also more likely to receive ad mail and to receive more pieces per delivery.

    - In households under $15,000, 52% received at least one piece of ad mail, and the average per ad mail delivery was 2 pieces. In households of $35,000 and over, 84% received an average of 3.4 pieces of ad mail. (These counts include the pre-election mail; the average number of ad mail items is based on households which received any ad mail.)

- The chances of receiving ad mail also increases with education, age and household size. And those who receive more ad mail are also more likely to be newspaper readers.

Composition of Ad Mail

- Approximately one-third of the pieces came from national advertisers --including book and magazine publishers, non-profit organizations, insurance and financial businesses, coupon distributors and miscellaneous other industries. Half of the pieces were for retail goods --17% from mail order houses, and 33% from retail operations, largely the mass merchandiser chains. The remainder were a miscellany of other local mailings.

- Although high income households receive more ad mail, the overall composition of their ad mail is similar to that which is received in low income households. The data do not indicate whether they receive mail from different mail order houses, but the proportion of their mail from mail order houses was the same as for low income households. The same was true for the other categories of ad mail.

- The composition of each day's mail is also remarkably similar. Monday's mail contained only a slightly smaller proportion of mass merchandiser ad pieces and Saturday's mail contained a somewhat larger proportion of mail order pieces, but in general each day's mail delivery contained the same proportions of all types of ad mail.

- The one thing that was common to most of these pieces of ad mail was that 7 out of 10 came addressed by name. "Resident, occupant" or "postal route patron" was used primarily by the discount chains, supermarkets, coupon distributors and shoppers.

- Most pieces also used color but in a variety of combinations of spot, process, paper, and ink. (The recipients appear to under-perceive the actual use of color.)

- With respect to other characteristics, the ad mail comes in all shapes, sizes, and forms. Although some are more common than others for particular types of advertisers, there are many variations in format, kinds of paper, sizes, and number of pages. When envelopes are used, these too vary in size, color, stock, style, and printed matter.

- These variations are of course designed to lend distinctiveness to individual mailings. But the over-all effect is kaleidoscopic. It suggests that with the increase in the amount of direct mail, as each piece clamors for attention all have a harder job to break through.

Treatment of Ad Mail

- In the call-back interview respondents were asked how each piece of mail was actually handled. Since they had been alerted on the previous day to this interview it is reasonable to infer that the day's ad mail actually received more attention than it might ordinarily. Nevertheless, only 25% of the pieces of ad mail were read right away. 39% were set aside either after a quick scanning (16%) or "to be read later" (23%). 29% were "thrown out," 6% without even being scanned. (Since they had in fact been asked to hold all that day's mail to send us after the interview, the number of pieces to be "thrown away" may have been under-reported.) Altogether 64% were either read or scanned.

- Attention to ad mail decreased as the amount of ad mail increased. In households which received only 1 or 2 pieces of ad mail, 52% had said they usually read all the mail, and 73% of the pieces were read or saved. But in households which received 3 or more pieces of mail, only 37% of the gatekeepers said they usually read all the mail and 61% was read or saved. 33% of their ad mail was thrown away immediately, compared with 20% of the ad mail in the light mail households.

- Even the mail that was saved or scanned was destined to be thrown away in half the cases. This was true in heavy and light mail households. A positive response--"probably will act or use the ad"--was anticipated for fewer than one in ten of these pieces. This positive response was anticipated mainly for the coupons and supermarket mailings (49% and 35%, respectively).

- Ad mail addressed to someone else in the household has a good chance of not getting to the targeted consumer. These gatekeepers of the household mail were asked, in the first interview, what they did with mail for someone else in the household, if they were sure it was something the other person did not want. One in four said they would throw it out. This occurs more frequently in high income households than in low income households. And while 21% of the next day's ad mail was addressed to others, less than 10% was set aside to be given to someone else.

Attitudes Toward Ad Mail

- Despite the efforts to improve the quality of direct mail, the prevailing attitudes toward unrequested advertising mail are generally disparaging. And although most of it is personally addressed few adults are flattered and many are annoyed at being on mailing lists.

74%	think of ad mail as just more "junk" to throw out;
61%	are annoyed that advertisers get their names;
43%	think mail ads tend to be pushy, high-pressure ads;
38%	think the majority of the ads are interesting or useful;
27%	think mail companies offer high quality merchandise at very reasonable prices;
22%	are flattered to get personally addressed advertising.

- When newspaper advertising is compared to direct mail, newspaper advertising is seen as superior to direct mail advertising on both convenience and trustworthiness:

82%	say newspaper ads make it easier to compare prices at different stores;
65%	said newspaper ads are more likely to get to them when they are in the mood to read;
73%	said mail ads are more prone to advertise silly gadgets;
76%	think mail ads are more prone to make products look better than they really are.

Unfavorable opinions about ad mail and favorable opinions about newspaper advertising are particularly strong among those who receive more ad mail: high income families, the better educated, and those who are 35-54 years old.

- Those who receive more advertising through the mail also receive more at the door. The overwhelming majority in all segments prefer grocery ads in the newspapers, by a margin of 7 to 1.

DETAILED FINDINGS

VOLUME OF HOUSEHOLD AD MAIL

The amount of direct mail advertising in the family mail box was measured in two ways. In the initial screening interview the person who is usually the first one to go through the household mail was asked how often and how much ad mail there was in the average week. And in the call-back interview they were asked to describe each piece of mail received that day.[1]

How Often and How Much

In answer to the general question, 94% estimate that they receive ad mail at least once a week. Four out of ten say they receive ad mail several times a week, and almost one-third say they receive ad mail every day. And when asked to make a rough estimate of the amount of ad mail they receive in an average week, half estimate that there are five or more pieces in the household mail.

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[1] They were also asked to send in all the mail they did not wish to keep, to permit further analysis of direct mail.

Table 1: Estimated Ad Mail in the Average Week

	N=(756)
(a) How often?	
Almost every day	30%
Several times a week	39
Once a week	25
Less often	6
(b) How many pieces?	
One or two	17%
Three or four	34
Five to ten	35
More than ten	14

One Day's Mail

Their description of all the mail they received on the day of the call-back interview revealed that two-thirds received ad mail (66%); the remainder either received no mail (21%) or only personal mail (13%). If we count only those who received any mail, 84% of the deliveries included advertising mail. This exceeds the number of deliveries that included personal mail (74%).[1]

Table 2: Composition of One Day's Mail

N=	All households (616)	Household which received mail (488)
Personal[a] and ad mail	45%	58%
Only ad mail	21	26
Only personal mail	13	16
No mail	21	

[a] "Personal mail" includes all non-ad mail, such as subscriptions.

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[1] The difference between 84% and 74% is too large to be due to chance sampling variation. That is, it is statistically significant.

Moreover, the actual number of pieces of ad mail delivered on the day of the call-back interview exceeds the personal mail pieces. A total of 1057 pieces of ad mail and 859 pieces of non-ad mail were reported for the 616 households. Since this survey was made during the last three weeks of October, when pre-election candidate mail was heavy, such pieces can be eliminated from this count to obtain a more typical count. This leaves 975 pieces of ad mail, which still exceeds the 859 pieces of non-ad mail. These average out to 1.6 pieces of ad mail and 1.4 pieces of non-ad mail per day per total households.[1]

The proliferation of ad mail is observable from personal experience as well as from industry and postage growth figures. But an indication of how much it has increased per household can be derived from comparing figures obtained in this national study with data from an 8-city study conducted by NAB in 1977. In that study, which was conducted by personal interview in 448 households, respondents were asked to send us the mail they received in the course of that week. In the present study respondents were asked to send us the ad mail they had received--and described--on the day of the call-back telephone interview. The average number of pieces per day, based only on the mail they sent us, was three times greater in the present study: the per day average rose from .3 pieces in 1977 to .9 pieces in 1982, or from 1.8 per week to 5.4 per week.[1] (This comparison is based only on the mail which the respondents sent to the research companies because the 1977 study did not obtain a count of the mail actually delivered to the household.)[2]

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[1] Consumers tend to believe that they usually receive even more mail than was actually counted. When asked to compare the volume of the day's entire mail with their usual mail, one-third (37%) said it was about the same. The rest were far more inclined to say that it was less than usual (41%) than to say it was more (17%). This was particularly true of those who did not receive ad mail; two-thirds of this group said they usually receive more mail. (See Table A-4 in the Appendix.)

Table 3: Volume of Ad Mail Sent In, 1982 vs. 1977

	1982	1977
Total households	616	448
Ad mail pieces sent in	550[a]	807
	(one day)	(one week--i.e. 6 mail deliveries)
Average per day	.9	.3
Average per week	5.4	1.8

[a] Excluding 55 pieces of pre-election candidate mail from the total of 605 pieces sent in.

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[1] Statistically significant difference.

[2] The proportion of households which sent mail for the study also increased, from 32% in the 1977 study to 46% in the 1982 study. While this might be taken as further indication that more households now receive ad mail, differences in the methodology of the two studies preclude using these numbers with confidence.

Who Received Ad Mail

Although ad mail is so widespread that it is sent to most segments of the population, there are variations in the proportions who receive any ad mail and in how much they receive. Thus high income households--which are also more likely to receive personal mail--are more likely to receive ad mail and to receive more pieces of ad mail. One-third of the under $15,000 households received no mail on the day of the interview, while almost all of the $35,000 and over households received mail. There was personal mail for 79% of the highest income group, compared with 48% of the lowest group, and ad mail for 84% and 52% respectively.

Table 4: Composition of One Day's Mail by Household Income

	Total	Under $15M	$15M-$24.9	$25M-$34.9	$35M & over
N=	[illegible]	(131)	(146)	(122)	(87)
Personal and ad mail	46%	[illegible]	40%	46%	70%
Only ad mail	21	21	23	19	14
Only personal mail	13	17	15	16	9
No mail	21	32	22	20	7
Half or more was ad mail	53%	43%	50%	55%	62%
Mean # pieces of ad mail[a]					
Among total households	1.7	1.0	1.5	1.6	2.9
Among household which received ad mail	2.6	2.0	2.4	2.5	3.4

[a] This includes pre-election candidate mail which was included in the tabulations of ad mail unless otherwise noted.

The chances of receiving ad mail also increase with the level of education and age of the individual reporting for the household, dropping off only after age 65. Ad mail is also contingent on household size: although households with only one adult were just as likely to receive some ad mail, they did not, understandably, receive as many pieces. (See Table 5.)

Although the variations in yesterday newspaper readership correspond to the variations in having received any ad mail, yesterday readership is generally slightly higher. Yesterday readership was noticeably higher than receipt of ad mail in households under $35,000, in the Northeast, among high school graduates and among older respondents. That is, these households are more likely to be reached by newspaper advertising than by direct mail. But high income households, and households with three or more adults, are more heavily targeted by both kinds of advertising; they receive more ad mail in addition to being "yesterday" newspaper readers.

Table 5: Receipt of Ad Mail and Yesterday Newspaper Readership by Background Characteristics

	Read yesterday	Received ad mail	Mean # of pieces: In all households	Mean # of pieces: In HH that recvd. ad mail	Half or more was ad mail
	%	%			%
Total[a]	73	67	1.7	2.6	53
Under $15,000	64	52	1.0	2.0	43
$15,000-$24,999	75	63	1.5	2.4	50
$25,000-$34,999	75	65	1.6	2.5	55
$35,000 + over	82	84	2.9	3.4	62
Less than h.s. grad.	64	62	1.7	2.8	52
H.S. grad.	74	63	1.4	2.3	49
Some college	74	73	2.0	2.8	58
College grad.	77	76	2.2	2.9	62
18-34	63	60	1.3	2.1	48
35-54	76	72	2.2	3.0	55
55 and older	81	68	1.7	2.5	58
Northeast	74	62	1.8	3.0	49
North Central	78	67	1.6	2.3	53
South	65	67	1.6	2.4	56
West	77	73	2.0	2.7	57
One adult	72	63	1.2	1.9	51
Two adults	70	67	1.8	2.7	53
Three or more	81	69	2.0	2.9	56

[a] "Read Yesterday" percentages based on the first interview sample. The remaining columns are based on the call-back sample. Percentage bases for demographic groups in both samples are shown in the Appendix (Table A-16).

COMPOSITION OF DIRECT MAIL ADVERTISING

The individual pieces of ad mail received in these households came from a range of advertisers and they came in a variety of forms, sizes, etc. Following is a summary description of the pieces given by the respondents.[1]

Range of Advertisers

Approximately one-third of the pieces came from traditional national advertisers--magazine publishers, non-profit organizations, insurance and financial businesses, coupon distributors and miscellaneous other industries (auto manufacturers, hotels and resorts, etc.).

Half of all the pieces were for retail goods--17% from mail order houses, 24% from mass merchandisers, and 9% from other local retail operations.

The remainder were a miscellany of other local mailings--from utility, medical, financial and other service companies, from educational and entertainment advertisers, from local fundraising and other organizations, and shoppers. (Table 6).

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[1] The ad material which they sent in after the interview was also coded. Since the two are quite similar, the above-reported descriptions are taken from the respondents' reports unless otherwise noted because this provides a larger base of all 1,057 pieces received. (See Tables A-12 and A-13 in the Appendix for kinds of ad mail reported and ad mail sent in.)

Table 6: Types of Advertisers Who Sent the Ad Mail Pieces

		N= (924)[a]
National Advertisers		32%
Publishers		9
Non-profit organizations		8
Insurance, financial businesses		6
Coupon distributors		4
Misc. industries		2
All other		3
Retailers		50
Mail order houses		17
Mass merchandisers		24
National chains	8	
Discount (general mdse.)	6	
Supermarkets	7	
Other (home improvement, etc.)	4	
Other local stores		9
Other Local, Regional Advertisers		18
Services		7
Education, entertainment		4
Fundraising, political issues		2
Shoppers		3
Other		3

[a] This base excludes the 82 pieces of pre-election mail from political candidates and the 51 pieces which were reported but without adequate identification of the sender.

Who Receives This Mail

In describing the volume of ad mail, it was reported that high income households are more likely to receive ad mail and to receive more pieces of ad mail. The question addressed here is whether they receive different kinds of ad mail. Table 7 suggests that they do not. The general composition of the mail received by high income households is remarkably similar to that received in low income households. There may be some discriminations which cannot be documented from this data as to which mail order houses or department stores comprise the mail in high and low income households, but the breakdown by individual mass merchandisers which is possible shows very small differences.[1]

This general uniformity also emerged in answer to the question asked in the first interview: "What kinds of companies or organizations send you mail advertising?" Apart from magazine solicitations and food coupons which were mentioned more often by high income respondents, there were no significant differences across income groups. (See Appendix Table A-3.)

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[1] Breakdowns of totals on table 7 for national chains and discount chains:

	Total	$15.M	$15M- $24.9	$25M- $34.9	$35M & over
N=Total ad mail pieces	(1057)	(136)	(223)	(196)	(249)
National chains					
Sears	3%	2%	2%	6%	3%
Penney	2	2	2	2	2
Ward	2	1	2	3	2
Discount					
K-mart	2	2	3	1	1
Other	3	2	4	3	2

Note: Sub-totals differ slightly from those shown on Table 7 due to rounding.

Table 7: Kind of Ad Mail Received, by Household Income

(Base = Total Pieces of Ad Mail They Received)

	Total	Under $15M	$15M-$24.9	$25M-$34.9	$35M & over
N=	(1057)	(136)	(223)	(196)	(249)
	%	%	%	%	%
"NATION-WIDE" DIRECT MAIL					
Mail order goods	15	15	13	13	17
Publishers	8	3	11	9	9
Non-Profit (Pol., Rel.)	7	7	8	8	6
Insurance, financial	5	7	5	6	4
Coupons	3	7	3	4	3
Misc. industries (auto, resorts, etc.)	2	-	2	3	2
All other	3	2	2	2	3
MASS MERCHANDISERS					
National chains (SPW)	7	3	6	10	7
Discounts (K mart, others)	5	4	7	4	3
Supermarkets	6	10	6	4	5
Other mass mdsrs. (Home improvement etc.)	3	2	3	2	2
"LOCAL/REGIONAL					
Stores	8	5	7	9	8
Shoppers	3	5	4	1	3
Services (Health, maintenance, utilities, financial, etc.)	6	3	7	7	4
Educ./Entertainment	3	5	2	3	2
Political	9	12	9	10	8
Other (relig. & misc.)	2	4	2	3	2
No answer	5	7	3	4	5
Subtotals					
Total political	11	13	11	13	11
Total educ./cultural	4	2	3	3	8
Total religious	3	6	3	3	2
Total retail stores (including mass mdsers.)	29	25	30	29	25
Total retail (including mail order)	44	41	43	42	43

One final observation should be made about the kinds of advertising these consumers received. One advantage of newspaper advertising is that it serves to reach the thin market for particular merchandise on any given day, and as a reminder to generate store traffic. But mail advertising is necessarily periodic: even with the best of production and mailing costs, there are limits on how frequently they can be mailed. Thus although half the respondents say they receive department store advertising, only 6% received mail advertising from a department store in the one day's mail they reported.

Table 8: Kinds of Ad Mail Mentioned in First Interview and Kinds of Ad Mail Received Next Day

Major mentions	First Interview: What kinds of companies send you mail advertising?		Callback Interview Comparable categories of ad mail received on one day
	Total sample	Callback sample	
Department stores	48%	50%	6%
Magazines	25	25	11[a]
Grocery coupons	23	22	5
Supermarkets	21	21	9
Mail order companies	20	20	17
Insurance companies, banks	19	19	9
Charities	17	17	3
Book clubs	17	16	
Base	(756) respondents	(616) respondents	(616) respondents

[a] Includes book clubs and other publications-related ads

On What Days Do They Receive It?

The composition of each day's mail is also remarkably similar. There are some small differences--e.g. Monday's mail contained somewhat fewer pieces, relatively, of mass merchandisers' mail, Saturday's mail[1] contained relatively more mail order house pieces, but in general the various kinds of ad mail were delivered every day of the week. (Table 9).

This suggests that insofar as particular kinds of advertisers wished to target particular days, mail service was not thoroughly successful. This was borne out in a pre-test of this study with 100 households in Detroit. Although K mart marriage mail advertising was supposed to be delivered to all Detroit residents on Tuesdays during the interview period, only one-third of the Tuesday and Wednesday respondents reported finding K mart mail in their mail deliveries.

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[1] It should be noted that although the initial screening interviews were evenly distributed through the days of the week, somewhat fewer call-back interviews were made on Saturday. (See Table A-14 in the Appendix.) It follows that the number of mail order catalogs in the total mail may be under-represented.

Table 9: Composition of Ad Mail by Day of Week

(Base = Total Pieces of Ad Mail Delivered)

	Mon	Tues	Wed	Thurs	Fri	Sat
N=	(196)	(213)	(226)	(165)	(154)	(103)
	%	%	%	%	%	%
"NATION-WIDE" DIRECT MAIL	43	42	41	39	47	41
Mail order goods	14	13	15	11	15	21
Publishers	10	12	7	7	7	1
Non-Profit (Pol., Rel.)	7	3	8	9	9	8
Insurance, financial	3	6	5	6	5	5
Coupons	5	3	2	2	5	3
Misc. industries (auto, resorts, etc.)	2	2	2	2	3	3
All other	2	3	2	2	3	-
MASS MERCHANDISERS	17	25	24	20	20	22
National chains (SPW)	7	7	5	9	7	9
Discounts (K mart, others)	3	9	6	4	6	2
Supermarkets	5	5	8	5	5	8
Other mass mdsrs. (Home improvement, etc.)	2	4	5	2	2	3
"LOCAL"/REGIONAL	35	31	31	32	27	32
Stores	6	12	8	8	6	7
Shoppers	3	1	5	3	1	1
Services (utilities, health, maintenance, financial, etc.)	3	7	7	4	8	9
Educ./Entertainment	4	5	1	5	2	4
Political	16	5	8	10	7	8
Other (relig. & misc.)	3	1	2	2	3	3
No answer	5	2	4	9	6	5

How Mail Was Addressed and Packaged

Seven out of ten pieces came addressed by name, mostly to an individual. This was almost universally true of traditional national direct mail (except coupons) and the catalog houses. It was also the case with the majority of pieces from local retail stores (70%) and the national chains (61%). But mail ads from other mass merchandisers, as with coupons and shoppers, were largely addressed to "resident, occupant" or "postal rate patron."

Table 10: How Direct Mail Was Addressed[a]

Base=	1057 pieces
To respondent by name	42%
Other person in household	22
Family by name	7
By name, total	71
Resident, occupant	21
Postal route patron	7
No answer	1

[a] See Appendix Table A-6 for each type of mail.

Fewer than half the pieces came in an envelope (45%). Envelopes were generally the rule from national advertisers. They were also used, more often than not, for mail from local service advertisers --utilities, medical and financial services, etc. Local retailers and mass merchandisers rarely used envelopes (20% of local stores and 26% of mail from the national chains; none from other mass merchandisers).

The pieces which came in an envelope generally contained a letter (67%). But this was more characteristic of traditional national advertising than of ads from local services, which often came in the form of brochures along with bills and return envelopes.

The majority of the items which did not come in an envelope were described as circulars, folders or brochures. One quarter were catalogs. These were mostly from mail order companies (69% of their mailings were catalogs), national chains (46% were catalogs), and local stores (32%). 38% of the pieces from the local services were described as "cards," but they comprised only 6% of the total mail. (See Appendix Table A-7 for contents of each type of ad mail.)

Table 11: Contents of Ad Mail

Mail in envelope	(45%)	Not in envelope	(55%)
What is in envelope?		What is it?	
Letter	67%	Catalog	23%
Card	21	Circular	34
Brochure	45	Folder, brochure	21
Coupons	10	Shopper guide	9
Return envelope	43	Card	6
Bill, statement	7	Other	3
Other	7	No answer	4
No answer	4		
	Base (476)		Base (577)

Note: Multiple answers possible.

An attempt was made to determine which pieces came as marriage mail, but the question which was asked seems not to have succeeded. Since the term "marriage mail" is not commonplace for consumers, they were asked, for each piece of ad mail which did not come in an envelope, "Did it come folded together with other items? How many items came folded together? Which ones were they?" Only 20 pieces of ad mail were described as having come folded together with other pieces, but 44 of the 605 pieces of mail that were sent in were found to be marriage mail; this is 7% of all the pieces, or 13% of the non-envelope mail sent in by the respondents.

Physical Make-up of the Ads

(1) Use of color

The use of color is widespread. With few exceptions the majority of pieces from all advertisers were described as containing at least some color. The exceptions were the shoppers (54% b/w only) and mail from political candidates in the forthcoming election (63% b/w only). Direct mail for merchandise contains few pieces that are only b/w, although a sizable proportion are printed in a combination of b/w and color.

But consumers appear to under-perceive the actual use of color --at least when they are asked just one question. Thus 28% of the pieces were described as b/w only, but among the pieces they sent in only 9% of the pieces were all b/w. The combinations of color use in spot, process, paper and ink are quite varied, and apparently not noticed by consumers. (See Appendix Table A-8 for use of color in each type of ad mail.)

Table 12: Use of Color

Respondent report: "Are the contents printed in black and white or color?"

Color	38%
Color & b/w	32
B/w	28
No answer	2
Base	(1057)

Classification of ad mail sent in:

2 color ink on white	19%
All pages process color	14
All pages spot color	6
Black ink on colored stock	6
All 1-color ink, not b/w	4
Some pages b/w; some color	11
Some pages b/w; some process color	5
All b/w	9
Various	26
Base	(605)

(2) Kind of paper

Here too it was difficult to obtain great precision from the respondents in the telephone interview. The question asked was "Excluding the envelope, is it printed on the kind of paper that daily newspapers are printed on or more like the paper that magazines are printed on?" 35% of the pieces were described as "magazine paper," 27% as "newsprint" and 27% as "letter paper."[1] The leading users of each of these types of paper are shown below.

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[1] Among the 605 pieces sent in, 45% were on letter/flyer paper, 21% on newsprint, 20% on coated paper, 7% on roto paper and 7% on card stock. If these percentages are compared with the percentages for the equivalent categories shown above, it would appear that

Table 13: Leading Users of Each Type of Paper

"Magazine paper"	(35%)	Newsprint	(27%)
Coupons	77%	Supermarkets	87%
Mail order goods	67%	Shoppers	75%
Local retail	60%	"Other mass mds." (home imp., etc.)	73%
		Discount chains	67%
		National chains	46%
Card stock	**(9%)**	**"Letter paper"**	**(27%)**
Services (utilities, etc.)	29%	Political (cand., etc.)	51%
		Financial	64%
Insurance, financial	13%	Non-profit	51%
Political, cand., etc.	13%	Publishers	46%

(3) Sizes and number of pages (Tables not shown)

Direct mail does not present a standardized picture. Even the envelopes vary considerably in size. Three out of five envelopes were more or less conventional envelope size--4 x 6 to 4 x 11--but the rest were either shy of one of these dimensions, e.g. 3 x 10, or larger, up to 14 x 21. The pieces enclosed or sent without an envelope fall into three groups: 42% were smaller than 8 1/2 x 11, 30% were 8 1/2 x 11, and 28% were larger. But this does not inform the readers about the actual diversity, since they ranged in size from 1 x 10 to full broadsheet (21 x 29).[1]

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respondents kept more of the "magazine paper" ads, which comprised 35% of what they received but only 27% of what they sent in. And conversely it would appear that they found it easier to part with ads printed on letter/flyer paper.

[1] These dimensions are taken from the pieces that were sent in, because respondents were not asked about the pieces that came in envelopes and because respondent judgment of size was not always accurate. In general, however, the tabulation of respondents' descriptions and what we found are similar. There were some extravagant sizes reported (32 x 44 or 68 x 18) which were not found among the pieces sent in.

In number of pages, too, there was a very wide range: 20% were one page (one or two sides), but 10% were more than 40 pages long. (The overall average was a mean of 11 pages and a median of 3.6 pages.) The lengthy pieces were the catalogs from mail order houses and national chains, and the shoppers; the coupons also came in fat packages. The mean number of pages (sides) for these four categories of mail pieces were as follows: national chains - 22 pages; mail order houses - 20 pages; coupons - 19 pages; shoppers - 17 pages.

These counts are taken from the respondents' description of the 1057 pieces of ad mail they received. The counts we made of the pieces that were sent in are slightly higher: the overall average was a mean of 13 pages and a median of 7.4 pages. One explanation of this discrepancy (which is spread across almost all categories) is that respondents undercounted the number of pages, but it is also possible that they were more inclined to part with the bulkier pieces.

To sum up the nature of the ad mail received in American households in October, 1982, there is a wide range of ad mail from national advertisers, mail order houses, mass merchandisers, other retail advertisers, from non-profit organizations, from utility companies and other service businesses, from educational and entertainment advertisers, and so on. And although some segments of the population receive more ad mail than others, it would appear that they receive the same kinds of ad mail.

As for the characteristics of these pieces of ad mail, most pieces were addressed by name and most pieces used color. But there was considerable diversity in other respects. Consumers appear to under-perceive the extent of the use of color, which occurs in highly varied combinations of spot, process, paper and ink. There is also considerable variation in the kind of paper used, in sizes of envelopes and of the ads themselves, and in the number of pages.

No tabulation was made of the kind of paper used for the envelopes, but a cursory look at the ads sent in by respondents shows wide variation here too, in the color, stock, and style of envelopes--some with windows, some with labels, some with messages, etc.

This diversity, which may lend distinctiveness to some individual mailings, has a kaleidoscopic effect when viewed as a mass. And it suggests that as the amount of direct mail increases, with each piece designed to claim attention, many pieces will suffer from the effect of clutter.

HOW AD MAIL IS TREATED

How the Mail is Usually Handled

The respondents selected for this study were the first to look over the household mail. In 78% of the households they were women. 58% of the respondents are usually at home when the mail arrives. This happens less often with the men (44%) than the women (63%). In households with two or more wage earners, only 38% are at home when the mail arrives; 57% do not see the mail until they get home from work.[1]

In the screening interview they were asked about how they usually handle the mail. 48% reported that they usually read through all of it. The rest read only some of the mail, and either put other things aside or just throw them away. In describing the kinds of mail they put aside and the kinds they just throw away, ad mail predominated in both categories, but especially in the mail that's thrown away: 63% of the "put aside" mentions refer to ad mail, and 81% of the "thrown away" mentions refer to ad mail. (Table 14).

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[1] See Appendix Table A-1 for characteristics of the first person to look over the mail and Table A-2 for characteristics of those who are at home when the mail arrives.

Table 14: Usual First Handling of all the Household Mail

	N=(756 Respondents)
Read through all of it	48%
Read through some, put others aside	25
Read some things, throw other things away	21
Put it all aside until later	6

What kinds of mail do you put aside till later?
What kinds of mail do you throw away?

	Put aside	Thrown away	Total
Base (mentions)	(244)	(199)	(402)
"Advertisements"	43%	54%	53%
"Junk mail"	12	17	16
"Catalogs, brochures, stores, sales info."	7	8	8
"Coupons"	*	2	1
"Contest, sweepstakes"	2	1	2
Total ad mail mentions[a]	63%	81%	80%
"Bills"	11	3	8
"Mail from insurance cos."	2	4	3
Mail for others in family	6	-	3
Magazines	9	2	6
All other mentions	9	10	10

* Less than 0.5%

[a] Mail from insurance companies, listed below, might also be advertising.

How One Day's Ad Mail Was Handled

In the call-back interviews, respondents were asked how each piece of ad mail was actually handled. And here it turned out that only 25% of the pieces of ad mail were read right away. 39% were set aside, either after a quick scanning (16%) or to be read later (23%). And 29% were "thrown out," 6% of them without even being scanned.[1] Thus a total of 64% were either read or scanned.

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[1] These pieces were not in fact thrown away because they had agreed to hold and send us the mail.

Since they had been alerted to the forthcoming interview about the day's mail, it is reasonable to infer that the day's ad mail actually received more attention than it might ordinarily. It should also be noted that because they had been asked to hold all that day's mail to send to us after the call-back interview, the number of pieces to be thrown away immediately was probably under-reported.

Table 15: What Happened to Each Piece of Ad Mail Received in One Day's Mail

Read through right away	25%
Scanned and threw away	23
Scanned quickly and saved	16
Total read or scanned	64
Put aside to read later	23
Threw away without scanning	6
Gave to someone else	6
Other, no answer	1
Base (Total pieces of ad mail)	(1057)

The Gatekeeper's Screening of Mail for Others in the Household

In the first interview respondents were asked specifically what they did with mail for someone else in the household, if they were sure it was something the other person did not want. A majority said they would save it in any case, but one in four said they would or might throw it out. In fact, while 21% of the next day's mail was addressed to others, only 6% was set aside for someone else, and a few more that were not so designated at first were also ultimately to be set aside, to be given to someone else. (See Table 17.)

Thus ad mail addressed to someone else in the household has a good chance of not getting to the targeted consumer. This is particularly true in high income households. In low income households only 16% said they would or might throw such mail out, compared with 35% in $35,000 and over households.[1]

Table 16: Screening (Unwanted) Mail for Others

	Base	Save it regardless	Throw it out	Both; it depends	D.k., n.a.
Total	(756)	71	21	4	4
Under $15M	(154)	76	10	6	8
$15M-$24.9	(169)	72	20	5	3
$25M-$34.9	(146)	71	23	3	2
$35M + over	(108)	65	30	5	-

Expected Response to the Ad Mail They Received

When asked "What do you think you might do about it?" for each piece of ad mail they had not "thrown away" immediately unscanned, half the pieces were simply to be thrown away. The respondents said they would use fewer than one piece in ten for shopping or for a sale. An additional one in ten would be considered for possible response. The remaining 22% of the pieces would be kept for later examination or to be given to someone else, but respondents did not give any indication of whether they expected to respond.

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[1] These figures combine the unequivocal "would throw out" and "both, it depends."

Table 17: Anticipated Response to Ad Mail Not Thrown Away Unopened

Base =	(923) (Ad mail looked at or saved)
Probably respond (net)	8%
Shop, use for shopping	5
Keep to use for sale	1
Pay bill, write check	2
Possibly respond (net)	11
Think about using later	4
Might order, fill out	7
Use unclear (net)	22
Save it	9
Look at it later	7
Look again and throw away	4
Give to someone else	3
Throw it away	49
Other, d.k., n.a.	10

Relationship between Amount of Ad Mail and How It Was Handled

In general, people who receive more ad mail are less likely to treat it respectfully. Those who received three or more pieces of ad mail were less likely to have reported in their first interview that they usually read through all of their mail at once (37%, compared with 52% in the lighter mail households). On the day of the call-back interview less of their ad mail was read and/or saved (61% compared with 73% in the lighter mail households). And more of their mail was thrown out (33% compared with 20% in the lighter mail households). But for both groups half the ad mail they saved was clearly destined to be discarded without further ado, and few pieces showed promise of being acted on. (6% of the pieces in the heavier deliveries and 11% in the lighter deliveries.)

Table 18: Handling of the Mail, According to Amount of Ad Mail Received

	Received 1,2 pieces	Received 3+ pieces
Usual handling of the mail		
Read through all of it	52%	37%
Read some, put others aside	28	30
Read some, throw others away	13	27
Put all aside until later	8	6
Base (Respondents)	(236)	(174)
What happened to each piece of ad mail		
Read right away	28%	24%
Saved to read later	24	23
Scanned and saved	21	14
Total read and/or saved	73	61
Thrown out after scanning	16	26
Thrown out, unscanned	4	7
Total thrown out	20	33
Gave to someone else	7	5
Other, no answer	1	2
Base (ad mail pieces)	(331)	(726)
Anticipated response to ad mail not thrown away unopened		
Will probably respond	11%	6%
Will possibly respond	10	11
Use unclear	21	22
Will throw it away	51	48
Other, d.k., n.a.	7	13
Base (ad mail pieces looked at or saved)	(293)	(630)

Treatment of Different Kinds of Ad Mail

(1) Initial disposal (Table 19):

Coupons have the highest likelihood of being read right away (51%), and so does direct mail from local services (49%) which included utilities and medical services, both likely to contain bills as well as ads. The two other categories of ad mail with direct financial interest--mail from insurance and financial institutions and mail from publishers which often include sweepstakes offerings --are also good candidates for immediate reading (approximately one-third of the pieces) but almost as many of these pieces (32% and 27%, respectively) were simply scanned and "thrown away," or just thrown away unscanned.[1]

Direct mail for merchandise was grouped under three categories: mail order, mass merchandisers, and other local retail operations including department stores and other stores. Among the mail order ads, fewer than one in five were read right away (18%), 41% were put aside and 33% were thrown away, with or without scanning. The multi-gift/gadget catalogs are more likely than other mail order items to be put aside without being scanned, perhaps because these catalogs often contain too many kinds of items to consider when one is "going through the mail."

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[1] As noted earlier, this mail was not actually thrown away since respondents had agreed to send us this ad mail, and it may be inferred that attention to the ad mail was stimulated by the previous day's alert to hold the day's mail for the call-back interview.

More than one in four pieces of ad mail from retail operations (stores) was thrown away: 27% of the pieces from mass merchandisers and 36% of the pieces from other stores. Mail from discount operations was equally likely to be put aside (35%) or to be read right away (35%), but pieces from the other mass or local stores, were more likely to be put aside, especially those from supermarkets (58% vs. 16% read right away).

National and local non-profit mail (solicitations for financial or voting support for political issues and candidates, or wild-life, religious and charitable organizations) received little immediate attention; most of these pieces were either put aside or thrown away.

This discussion has centered on the handling of different types of ad mail, as shown in Table 19 which follows. See Tables A-9 and A-10 in the Appendix for handling of ad mail according to respondent characteristics. They show considerable uniformity in the habitual handling of mail and the treatment given the ad mail received on the call-back day, except for characteristics related to the amount of mail received (number of adults, number of wage earners, etc.).

Table 19: Initial Handling of Major Categories of Ad Mail

		Read right away	Put aside to read later	Scanned & saved	Scanned & thrown away	Thrown away un-scanned
	Bases	%	%	%	%	%
TOTAL AD MAIL	(1057)	25	23	16	23	6
"NATION-WIDE" DIRECT MAIL						
Mail Order Goods	(153)	18	23	18	24	9
Multi gifts/gadgets	(43)	16	40*	16	19	7
Single categ. catalogs	(56)	18	16	23*	29*	7
Single items	(60)	18	15	17	25	12*
Publishers	(84)	32*	16	16	27	5
Non-Profit (Pol., Rel.)	(74)	16	38*	15	20	5
Insurance, financial	(53)	36*	17	11	25	2
Coupons	(35)	51*	14	17	11	-
Misc. industries (auto, resorts, etc.)	(21)	29	14	29*	29*	-
MASS MERCHANDISERS						
National chains (SPW)	(74)	27	27	15	19	8
Discounts (K mart, others)	(57)	35*	16	19	16	11*
Supermarkets	(61)	16	38*	20	16	10
Other mass mdsrs. (Home improvement, etc.)	(33)	24	24	15	27	3
"LOCAL"/REGIONAL						
Stores	(82)	21	21	17	34*	2
Shoppers	(28)	18	25	25*	18	4
Services (utilities, maintenance, financial, health, etc.)	(63)	49*	13	13	13	3
Educ./Entertainment	(34)	18	18	21*	12	18*
Political	(98)	16	30*	4	35*	6
Other (relig. & misc.)	(24)	17	21	25	21	8

* At least 5% above average.

2) Anticipated action (Table 20):

The question asked for each piece of ad mail, "What do you think you might do about it?", cannot yield a precise measure of the response these ads actually elicited. Nevertheless, it does permit comparing the various categories of ad mail for their relative presumed effectiveness.

A sizable direct response ("probably will act/use the ad") was anticipated only for the coupon (49%) and supermarket (35%) mailings. The answers given for most of the other pieces suggest that few would lead to a purchase.

Thus, although more than half the ads for mail order goods were read right away and/or saved, only 7% seemed at all likely to generate an order. This was also true for the multi gifts/gadgets catalogs, despite the fact that more of them had been set aside for later reading.

Among the remaining retail operations, mailings from the national chains and general merchandise discount chains showed somewhat more promise of a possible response than mailings from other stores.

And, finally it would appear that although mail from insurance and financial institutions are initially relatively well-read, a very high proportion are then simply thrown away, with nothing further to be done about them.

Table 20: Anticipated Action on Ad Mail
Not Thrown Away Unopened

		Probably use/act	Possibly use/act	Use unclear	DISCARD
	Bases	%	%	%	%
TOTAL	(923)	8	11	22	49
"NATION-WIDE" DIRECT MAIL					
Mail order goods	(127)	7	12	19	56
Multi-gifts/gadgets	(39)	3	26	28	39
Single categ. catalogs	(48)	4	10	15	65
Single items	(45)	13	--	13	67
Publishers	(77)	3	14	23	56
Non-Profit (Pol., Rel.)	(67)	-	13	37	39
Insurance, financial	(47)	-	4	9	77
Coupons	(33)	49	18	15	15
Misc. industries (auto, resorts, etc.)	(21)		5	29	62
MASS MERCHANDISERS					
National chains (SPW)	(66)	6	21	17	41
Discounts (K mart, others)	(49)	4	25	18	45
Supermarkets	(55)	35	7	15	40
Other mass mdsrs. (Home improvement etc.)	(30)	3	3	30	47
"LOCAL"/REGIONAL					
Stores	(76)	4	8	21	55
Shoppers	(24)	13	4	25	50
Services (utilities, maintenance, financial, health, etc.)	(55)	7	2	26	49
Educ./Entertainment	(23)	4	17	39	30
Political	(85)	2	-	22	64
Other (relig. & misc.)	(20)	-	-	35	35

ATTITUDES TOWARD DIRECT MAIL AND NEWSPAPER ADVERTISING

Opinions about Unrequested Advertising Mail

The prevailing attitudes toward unrequested advertising mail are quite unfavorable. In the first interview, respondents were asked whether they agreed or disagreed with three favorable and three unfavorable statements about unrequested advertising sent through the mail. 74% agreed with the statement that such mail "just means more junk to throw out;" 67% said "no" to "mail companies offer high quality merchandise at very reasonable prices;" and 62% said "no" to "at least half the ads are interesting or useful." More than two out of five (43%) even agreed with the charge that mail ads tend to be pushy, high pressure ads. And although most direct mail is now personally addressed--or perhaps because of that--77% said it was not flattering to receive personally addressed advertising, and 61% said they were sometimes annoyed that advertisers get their names.[1]

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[1] Only 5% have actually ever asked to be taken off an advertiser's list, which suggests that those who have taken this step must feel very strongly indeed. Clearly the incidence of taking this step does not reflect consumer annoyance. Behavior Today (12/20/82) reports that the average organization does not hear from 96% of its unhappy clients or customers. (Data compiled by Technical Assistance Research Programs Inc.)

Thus all three of the favorable statements were rejected and two of the three unfavorable statements were widely accepted.

Table 21: Opinions about Unrequested Advertising Mail[a]

(N=756)

Unfavorable statements	Agree	Disagree	Favorable statements	Agree	Disagree
Just means more junk to throw out	74%	25%	Mail companies offer high quality merchandise at very reasonable prices	27%	67%
Sometimes annoyed that advertisers get my name	61%	39%	Flattering to get personally addressed advertising	22%	77%
Mail ads tend to be pushy, high-pressure	43%	55%	At least half are interesting or useful	38%	62%

[a] "No answers" not shown

When a count is made of the number of favorable opinions each respondent held about ad mail, no one was favorably disposed on all six of these items, and only 12% held favorable opinions on four or five of the items. 18% expressed three favorable views, 18% expressed two favorable views and 22% held only one favorable view. 20% held no favorable view at all. As shown in Table 22, this dispersion of opinions about ad mail is fairly uniform through all segments of the population, but the anti-ad mail feelings are somewhat stronger among those who receive more ad mail, and among Westerners. Consumers who are low income, young and less well educated are among the most approving of ad mail.

Table 22: Summary of Opinions about Ad Mail,[1] by Background Characteristics

	Most[a] Favorable	Somewhat[b] Favorable	Least[c] Favorable	Don't know,[d] No answer
Total	30%	18%	42%	10%
Under $15M	38	20	31	11
$15M-$24.9	31	19	42	8
$25M-$34.9	31	14	43	12
$35M & over	30	19	44	7
Ad mail pieces next day:				
none	35	19	34	12
1 or 2	34	20	37	9
3 or more	26	15	50	9
Northeast	30	23	38	9
North Central	30	14	46	10
South	35	18	35	12
West	21	20	51	8
Men	28	25	38	10
Women	31	17	43	10
18-34	36	19	36	9
35-54	26	17	48	9
55 & older	28	19	40	13
Less than h.s. grad.	37	22	30	11
High school grad.	29	18	44	9
Some college	31	14	44	11
College grad.	24	19	46	11

[a] Favorable opinion on 3 or more of the six statements

[b] Favorable opinion on 2 of the statements

[c] Favorable opinion on 1 or none of the statements

[d] Respondents who did not express an opinion on all six items

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[1] For responses to individual items by background characteristics see Appendix Table A-11.

What They Call Ad Mail

The consumer's low esteem for mailed advertising emerged in still another question. At the end of the second interview, after respondents had described all the pieces of ad mail they had in hand from the morning's delivery, they were asked what words they use to refer to non-personal mail. Sixteen percent had no short-hand way of describing ad mail. Among those who did, three out of four used derogatory words, and "junk mail" is the pervasive term they volunteered (62%).

Table 23: Words Used to Refer to Non-Personal Mail

Total mentions	(531)
Unfavorable terms	73%
"Junk mail"	62
"Worthless trash"	6
"Unnecessary nuisance"	3
Other	2
[illegible]orable terms	11
"Useful, informative"	7
"Nice, pleasurable"	4
Other	*
Neutral terms	16
"Advertising"	10
Misc. other	6

* Less than 0.5%

Question: "Excluding the personal mail, is there any word--or perhaps two or three words--that you use to refer to the rest of the mail you get?"

How Ad Mail Compares to Newspaper Advertising

In a second battery of questions in the first interview, consumers were asked whether four characteristics were more descriptive of mail or newspaper advertising. For each measure, respondents gave the advantage--by a wide margin--to newspaper advertising: the favorable characteristics were attributed to newspaper advertising and the unfavorable characteristics were attributed to mail advertising.

Four out of five said newspaper ads make it easier to compare prices at different stores. This is understandable since newspaper ads tend to be grouped in appropriate parts of the paper so that the reader knows where and when the ads appear. But catalogs and other mail advertising, with each piece tailored to its own offerings, may require considerable effort to find information on identical or similar items.

More than three out of five said newspaper ads are more likely to get to them when they are in the mood to read. This too is understandable. Since one obviously reads the newspaper when one is in the mood to read, it follows that the ads in newspapers get to the reader at that time. Newspaper ads are in fact a strong incentive for reading newspapers.[1] But going through the mail is not necessarily done when one is in the mood for reading; it is often a matter of just seeing what's in the mail. Some people read everything at once (48%) but the rest set aside some or all of the mail. And it is the advertising mail--which can be identified at a glance--which is set aside or thrown away. As reported earlier, only 25% of the ad mail pieces were read right away.

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[1] In the 1977 study, How the Public Gets Its News, 44% said they look forward to the ads when they pick up a newspaper, far more than for any of the other measured media (29% looked forward to magazine advertising, and only about 1 in 10 were drawn by advertising on TV or radio). See The Audience for Newspaper Advertising, NAB, 1978.

Mail ads also suffer by comparison with newspaper ads on two quality dimensions. Three out of four think mail ads are more prone to advertise silly gadgets (73%) and the same proportion (76%) think mail ads make products look better than they really are.[1] Presumably the consumer's experience is that the slick paper stock and high quality printing of much direct mail may exaggerate the quality of merchandise. By contrast, it may be inferred that readers know that newspaper ROP reproduction qualities do not permit an exact picture of the merchandise, and that newspaper advertising is not intended to do so.

These judgments--that newspaper ads present themselves at a more convenient time and in a more convenient form for comparisons, and that mail ads offer unwanted products and misleading pictorialization--are common in all segments. They are particularly strong among those who receive more ad mail: high income families, the better educated, and those who are 35-54 years old. (See Table 24.)

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[1] This is consistent with findings in a national telephone survey of 1,000 respondents who were asked about the believability of advertising in five media. 68% said that advertising in newspapers was believable; only 24% said advertising in direct mail was believable. (See Newspapers and Direct Mail: A Study of Advertising Believability, NAB, 1982.)

Table 24: Comparison of Mail and Newspaper Advertising

	% who say "newspaper advertising"		% who say "Mail advertising"		Net advantage to newspapers[a]
	Easier to compare prices	Get to me when in the mood to read	Silly gadgets nobody needs	Products look better than they really are	
Total	82	65	74	76	78
Under $15M	78	59	68	72	69
$15M-$24.9	82	70	77	78	80
$25M-$34.9	88	62	75	81	81
$35M & over	92	70	77	84	84
Ad mail pieces "next day":					
none	81	62	70	73	72
1,2	82	66	75	77	78
3 or more	83	61	76	86	82
Men	84	70	71	76	80
Women	81	63	74	76	77
18-34	83	65	73	75	78
35-54	89	68	78	80	84
55 & older	72	59	69	72	67
Less than h.s. grad.	71	62	70	72	71
High school grad.	83	63	74	74	75
Some college	86	71	74	80	82
College grad.	88	64	75	80	84

[a] Percent who favor newspapers over mail advertising on more than half of the four items, i.e. 78% of the sample favor newspapers over mail advertising in 3 or 4 of the comparisons each respondent made.

A separate question was asked about department store sale booklets as inserts in weekday newspapers. Some department stores distribute their sale booklets in Sunday newspapers and by mail as well. Because some newspapers now carry inserts in their weekday papers, consumers were asked whether they would prefer to get department store booklets of this type through the mail or in a daily newspaper. Not surprisingly, those who held favorable opinions about mail ads said they would prefer such booklets by mail and those who were least favorably disposed toward mail ads would prefer such booklets in their daily newspapers. It is also to be expected that yesterday newspaper readers would express a greater preference for receiving such booklets in their daily newspapers, and that non-readers would express a greater preference for mail. Nevertheless, almost one-third of those who did not read a newspaper yesterday would prefer to receive such booklets in the daily newspaper.

Table 25: Preference for Department Store Sale Booklets – By Mail or as Inserts in Weekday Papers

	By Attitudes Toward Ad Mail[a]			By Newspaper Readership	
	Most favorable N=(228)	Somewhat favorable (139)	Least favorable (314)	Read yesterday (549)	Did not (207)
Prefer booklets in daily newspaper	23%	35%	58%	46%	31%
Prefer booklets by mail	59	46	31	37	55
No preference	18	19	11	14	17

[a] Based on the 6-part question about mail advertising.

Hand-Delivered Circulars

Aside from getting unsolicited advertising in their mail box, one-third of the respondents also report having advertising left at their door. This reflects a sharp drop from the 8-city study findings in 1977 when three-fourths reported receiving hand-delivered advertising. It remains true as in 1977, that those who receive more ads through the mail also receive more at the door: it is reported by 44% of those who received three or more pieces of ad mail the next day, and 31% of those who did not receive any ad mail.

Table 26: Percent who Receive Advertising Left at the Door, by Amount of Ad Mail

		Base
Total	35%	(756)
According to pieces of ad mail received next day:		
None	31%	(206)
1 or 2	33%	(236)
3 or more	44%	(174)

But whereas in the 1977 study there were no differences by income level, the present national study indicates that there is target marketing against upper income sectors for hand-delivered circulars as well as for ad mail. Just as high income households are more likely to receive ad mail, they are now also more likely to receive door-delivered advertising. Thus the very segment which is most likely to have read a newspaper yesterday is also most likely to have received advertising by mail and by hand delivery as well. (Table 27).

Table 27: Advertising at the Door, Ad Mail, and Newspaper Readership, by Income

	Under $15M	$15M - $24.9	$25M - $34.9	$35M - & over
	%	%	%	%
Receive ads at door	33	37	33	49
Received any ad mail next day	52	63	65	84
Read newspaper yesterday	64	75	75	82

Among the various kinds of hand-delivered circulars they named,[1] circulars from supermarkets were mentioned most often. These were mentioned by 31% of those who receive door circulars, or 10% of the whole sample.[2]

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[1] The roster they named included: supermarkets, department stores, discount stores, toiletries, dry cleaners, restaurants, fast food stores, household services, religious circulars, home improvement, "local merchants", free samples, automotive ads, and others.

[2] Supermarkets and grocery store circulars were mentioned somewhat less often (19%) by top income respondents who said they receive door circulars. But since more of these householders report door circulars, this group as a whole is just as likely as lower income households to receive the supermarket circulars (9%).

Preferred Medium for Grocery Ads

When asked whether they prefer grocery ads in daily newspapers or grocery ads left at their door, the overwhelming majority prefer newspapers, by a margin of 7 to 1. Moreover, this preference holds among all segments of the population--even those where yesterday readership is lowest, such as the young and less well-educated, and low income households.

Table 28: Preferred Medium for Grocery Ads

	In newspapers	At door	No preferences
Total	78%	11%	11%
Under $15M	77	14	9
$15M-$24.9	78	13	9
$25M-$34.9	82	7	11
$35M & over	80	12	8
Weekly grocery expend.			
Less than $50	78	10	12
$50 to $75	78	10	12
More than $75	78	12	10
Pieces of ad mail next day			
none	78	13	9
1 or 2	77	11	12
3 or more	80	9	11
18-34	77	15	8
35-54	78	8	14
55 & over	78	8	14
Less than h.s. grad.	78	12	10
High school grad.	79	11	10
Some college	75	11	14
College grad.	78	8	14

To sum up these consumer attitudes, the prevailing opinions about direct mail advertising are generally disparaging. 74% say they are "junk" and 67% say they do not offer high quality and reasonable prices. Almost as many (62%) do not find many of the ads interesting or useful and 43% say mail ads tend to be pushy high-pressure ads. Along with the growth of the use of mailing lists, few are flattered to get personally addressed advertising (22%), and many are sometimes annoyed that advertisers get their names (61%).

In comparing newspaper ads with direct mail advertising, newspaper ads are seen as superior on both convenience and trustworthiness--they make it easier to compare prices, they are seen when the reader is in a receptive mood, they are far less likely to advertise silly gadgets nobody needs, and they are far less likely to make products look better than they really are.

These attitudes carry over to the potential appeal of department store sale booklets as possible inserts in the daily paper; those who were most critical of mail ads would prefer such booklets in daily papers rather than by mail.

And finally, there is a uniformly widespread preference to have grocery ads in newspapers rather than by hand-delivered circulars.

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Table A-1

Position in Household of First Adult to Look Over the Mail

(Designated Respondent)[a]

	Female Head	Other Female	Male Head	Other Male
Total	66%	12%	18%	5%
One adult households	71	-	29	-
Two adults	70	11	16	3
Three or more adults	49	30	8	13
No wage earners	70	8	19	3
One	71	9	18	2
Two or more	54	20	17	9
Under $15M	72	10	14	4
$15M-$24.9	68	10	19	3
$25M-$34.9	64	13	22	1
$35M and over	57	17	19	7
Less than h.s. grad.	70	11	15	4
High school grad.	65	15	15	5
Some college	68	11	17	4
College grad.	55	12	28	5
18-34	61	15	16	8
35-54	68	14	15	3
55 & over	68	8	22	2
Northeast	67	16	13	4
North Central	66	10	20	4
South	66	12	18	4
West	63	11	21	5
No ad mail next day	66	14	18	2
1 or 2 pieces	65	10	19	6
3 or more	66	16	13	5

[a] The first adult in the household to look over the mail was designated to be the respondent for this study. Interviewers were instructed to interview the female head of the household when the screening respondent said various people were the first to look over the mail (3%).

Table A-2

Presence at Home When the Mail Arrives

	At home when mail arrives	Pick it up when home from work	Go to post office	Other	N.A.
Total	58%	36%	3%	2%	1%
One adult households	52	43	3	2	-
Two adults	61	33	4	2	1
Three or more adults	59	37	3	1	-
No wage earners	82	10	6	2	-
One	63	33	3	2	1
Two or more	38	57	3	1	*
Under $15M	63	31	5	1	-
$15M-$24.9	54	39	4	2	1
$25M-$39.9	59	38	1	2	-
$35M and over	51	45	2	1	1
Less than h.s. grad.	78	17	4	1	-
High school grad.	58	36	4	2	*
Some college	56	39	3	2	1
College grad.	46	49	3	1	2
18-34	54	41	2	2	1
35-54	54	41	3	1	*
55 & over	72	21	5	2	1
Northeast	57	37	2	3	1
North Central	60	33	4	2	1
South	65	29	4	1	*
West	48	50	2	-	-
No ad mail next day	58	36	3	2	1
1 or 2 pieces	61	35	3	1	*
3 or more	55	37	6	2	1

* Less than 0.5%

Table A-3

What Kinds of Companies Send You Mail Advertising? (First Interview)
(Major Categories Mentioned)

	Dept. stores	Maga-zines	Food cou-pons	Super-mar-kets	Mail order compa-nies	Insur-ance, bank	Char-ities	Book clubs
Total	48%	25%	23%	21%	20%	19%	17%	17%
One adult households	50	18	18	18	19	19	15	14
Two adults	49	26	23	22	20	18	17	19
Three or more adults	44	29	25	22	21	22	17	12
No wage earners	49	23	14	21	19	18	18	13
One	49	25	25	21	21	17	18	20
Two or more	45	27	25	23	18	24	14	14
Under $15M	49	22	21	16	20	22	16	20
$15M-$24.9	48	21	20	25	17	18	17	19
$25M-$34.9	45	27	25	20	19	15	17	14
$35M and over	44	38	32	17	28	19	23	19
Less than h.s. grad.	44	23	22	15	17	16	15	12
High school grad.	46	23	20	24	20	19	15	16
Some college	49	24	24	22	23	19	21	19
College grad.	57	34	28	19	18	23	20	20
18-34	50	24	26	22	16	14	10	18
35-54	47	31	25	22	23	25	21	18
55 & over	47	20	16	20	20	18	21	13
Northeast	53	28	27	21	22	14	24	18
North Central	39	23	21	19	19	17	18	16
South	52	25	20	25	16	24	8	16
West	48	26	22	20	26	21	21	17
No ad mail next day	49	25	21	22	12	20	10	19
1 or 2 pieces	52	23	20	21	25	20	16	14
3 or more	47	29	26	20	25	17	27	15

Table A-4

Is Today's Mail More or Less than Usual

	Total	Ad Mail Pieces in Today's Mail None	1,2	3 or more
Usual amount	37%	15%	50%	47%
Less than usual	41	68	33	21
More than usual	17	6	15	31
No answer	5	11	3	1
Base	(616)	(206)	(236)	(174)

Table A-5

Respondent Description of What Each Ad Mail Piece Was About

Advertising	15%
Sales, specials, discounts	14
Catalogs, brochures	10
Product, merchandise mentions	14
Politics	8
Insurance, banking, investments	6
Coupons, free samples	5
Newsletter	5
Subscriptions, memberships	4
Donations	4
Contests, give-aways	3
Misc. service mentions	2
Travel, recreation	1
Seminar, course registration	1
Credit cards	1
Bills	1
All other	2
Don't know, no answer	6
Total*	102%
Base (mail ad pieces)	(1057)

* Mutliple mentions

Table A-5, cont'd

Respondent Description of What Each Ad Mail Piece Was About
(Major Mentions by Category)

Mail Order Goods	N= (153)
Product mentions	33%
Catalog, brochure	29
"Advertising"	14
Sales, specials, discounts	12

National Chains	(74)
Sales, specials, discounts	28%
Catalog, brochure	28
"Advertising"	12
Product mentions	11
Insurance	11

Discount Chains	N= (57)
Sales, specials, discounts	35%
"Advertising"	28
Product mentions	16
Catalog, brochure	9

Supermarkets	N= (61)
Sales, specials	51%
"Advertising"	39
Product mentions	5
Coupons	2

Other Mass Merchandisers	N= (33)
Sales, specials, discounts	46%
Product mentions	24
"Advertising"	12

Local Stores	N= (82)
Product mentions	32%
Sales, specials, discounts	26
Catalog, brochure	13
Coupons	4
Bills	2

Nat'l Publisher Mail	N= (84)
Subscriptions	32%
Product mention	18
Contests, give-aways	14
"Advertising"	10

Nat'l Non-Profit	N= (74)
Donations	35%
Newsletter	15
Politics	15
Subscription, membership	12

Nat'l Insurance, Financial	N= (53)
Insurance, Banking investments	83%
"Advertising"	11

Misc. Nat'l Industries	N= (21)
"Advertising"	43%
Coupons, free samples	10
Subscription, membership	10

National Coupons	N= (35)
Coupons	83%
"Advertising"	6
Subscriptions	3
Product mentions	3

Local Services	N= (63)
Services	24%
"Advertising"	19
Bills, credit cards	15
Insurance, banking	11
Newsletter	10
Coupons	5
Discounts	5
Brochure	3

Local, Educ., Entertainment, Cultural	N= (34)
Seminar, course registration	27%
Newsletter	21
Donations	9
"Advertising"	9
Catalog, brochure	6
Subscription, membership	3
Discounts	3

Table A-6

How Ad Mail Was Addressed and Whether in Envelope,
(By Category of Ad Mail)

		"Nationwide" Advertising					Mass Merchandisers				Local/Regional				
N=	Total (1057)	Mail Order (153)	Pub-lish-ers (84)	Non-prof. (74)	Ins., Finan. (53)	Cou-pons (35)	Nat'l Chains (74)	Dis-count (57)	Super-mkts (61)	Other mass (33)	Stores (32)	Serv-ices (63)	Educ/ Ent. (34)	Shop-pers (28)	Poli-tical[a] (98)
How mail was addressed															
Respondent, by name	42%	57%	58%	68%	53%	14%	30%	9%	7%	12%	53%	49%	38%	11%	48%
Other person in h.h.	22	30	31	18	28	--	27	2	2	3	16	30	32	--	21
Family by name	7	7	5	7	8	11	4	4	--	--	1	3	12	7	20
Total by name	71	94	94	93	89	25	61	14	9	15	70	82	82	18	89
Resident, occupant	21	4	5	4	2	63	31	59	68	67	23	10	15	57	6
Postal route patron	7	1	--	--	9	9	7	25	18	18	7	5	3	21	5
No answer	1	1	1	3	--	3	1	2	5	--	--	3	--	4	--
Were contents delivered in an envelope?															
Yes	45%	48%	86%	73%	91%	60%	26%	--	2%	--	20%	67%	38%	4%	51%
No	55	52	12	26	9	40	73	100	98	100	80	33	62	96	49
No answer	*	--	2	1	--	--	1	--	--	--	--	--	--	--	--

* Less than 0.5%

[a] Includes pre-election candidate mail

Table A-7

Contents of Envelopes and Format of Ads Not in Envelopes
(Major Categories of Mail)

		"Nationwide" Advertising					Mass Merchandisers				Local/Regional				
	Total	Mail Order	Pub-lish-ers	Non-prof.	Ins., Finan.	Cou-pons	Nat'l Chains	Dis-count	Super-mkts	Other mass	Stores	Serv-ices	Educ/ Ent.	Shop-pers	Poli-tical[a]
MAIL IN ENVELOPE N=	(476)	(74)	(72)	(54)	(48)	(21)	(19)	--	(1)	--	(16)	(42)	(13)	(1)	(50)
What is in the envelope?															
Letter	67%	54%	82%	89%	85%	--%	63%	--%	--%	--%	37%	52%	85%	--%	78%
Card	21	20	32	33	25	--	21	--	100	--	19	19	38	--	12
Brochure	45	80	40	31	37	5	63	--	100	--	63	55	23	--	24
Coupons	10	10	7	4	8	95	--	--	100	--	19	2	--	100	--
Return envelope	43	51	57	72	54	5	26	--	--	--	37	43	46	--	16
Bill, statement	7	9	7	--	2	--	5	--	--	--	19	32	--	--	2
Other	7	5	10	4	4	19	--	--	--	--	7	5	15	--	6
No answer	4	--	1	2	--	--	5	--	--	--	8	9	8	--	10
(Note: multiple answers possible)															
NOT IN ENVELOPE: N=	(577)	(79)	(16)	(19)	(5)	(14)	(54)	(57)	(60)	(33)	(66)	(21)	(21)	(27)	(48)
What is it?															
Circular	34%	9%	20%	37%	60%	37%	28%	58%	62%	43%	24%	29%	43%	33%	40%
Catalog	23	69	10	10	--	7	46	9	5	21	32	--	--	--	--
Folder, brochure	21	10	30	43	40	7	15	10	10	18	29	19	47	7	48
Shopper guide	9	5	--	--	--	7	7	14	15	12	6	9	--	44	--
Card	6	4	20	--	--	21	--	--	3	3	5	38	5	4	4
Other	3	--	--	5	--	14	2	--	--	--	1	5	--	--	6
No answer	4	3	20	5	--	7	2	9	5	3	3	--	5	11	2

[a] Includes pre-election candidate mail

Table A-8

Use of Color, by Category of Ad Mail

		"Nationwide" Advertising					Mass Merchandisers				Local/Regional				
	Total	Mail Order	Pub-lish-ers	Non-prof.	Ins., Finan.	Cou-pons	Nat'l Chains	Dis-count	Super-mkts	Other mass	Stores	Serv-ices	Educ/ Ent.	Shop-pers	Poli-tical[a]
Respondent report N=	(1057)	(153)	(84)	(74)	(53)	(35)	(74)	(57)	(61)	(33)	(82)	(63)	(34)	(28)	(98)
B/w	28%	12%	31%	42%	40%	6%	7%	11%	25%	6%	24%	35%	44%	53%	52%
Color	38	56	27	26	9	65	41	55	57	58	58	19	15	—	22
Color & b/w	32	31	40	31	51	29	48	32	18	36	18	41	35	43	24
No answer	2	1	2	1	--	--	4	2	--	--	--	5	6	4	2
Observed on Mail Sent In N=	(605)	(109)	(46)	(40)	(31)	(22)	(40)	(46)	(37)	(22)	(47)	(32)	(13)	(21)	(59)
All b/w	9%	3%	--	15%	3%	--	5%	4%	8%	--	15%	25%	46%	24%	15%
Some b/w, some spot color	11	1	4	3	--	--	17	31	46	40	4	6	15	42	--
All pages spot color	6	2	--	--	--	--	3	26	25	27	6	--	--	5	--
Some b/w, some process color	5	8	2	--	7	--	25	9	--	5	4	--	--	--	--
All pages process color	14	26	4	3	--	54	13	26	3	18	28	--	8	--	3
All 1-color ink, not b/w	4	2	2	--	--	--	--	--	5	--	15	16	--	--	10
Black ink on colored stock	6	1	11	5	7	--	--	--	--	5	2	6	8	14	15
2 color ink on white	19	7	24	32	51	5	12	--	8	--	9	31	23	5	48
Other combinations	27	51	52	39	32	41	25	4	5	5	17	16	--	10	9
No answer	*	1	--	3	--	--	--	--	--	--	--	--	--	--	--

* Less than 0.5%

[a] Includes pre-election candidate mail

Table A-9

Usual First Handling of the Mail by Respondent Characteristics

		Read some,		Put all aside until later
	Read through all of it	Put other things aside	Throw others away	
Total (N=756)	48%	25%	21%	6%
One adult households	45	26	22	7
Two adults	48	23	23	6
Three or more adults	49	30	17	5
No wage earners	53	23	22	3
One	49	24	21	6
Two or more	43	28	22	8
Under $15M	51	27	19	4
$15M-$24.9	45	20	28	8
$25M-$34.9	51	25	19	6
$35M and over	42	31	26	2
Less than h.s. grad.	50	23	20	7
High school grad.	48	24	20	8
Some college	43	29	26	3
College grad.	48	26	22	3
18-34	46	28	20	6
35-54	49	25	22	5
55 & over	48	22	23	8
Northeast	46	29	22	4
North Central	44	25	22	9
South	55	23	18	5
West	41	25	27	7
No ad mail next day	53	20	21	5
1 or 2 pieces	52	28	13	8
3 or more	37	30	27	6

Table A-10

What Happened to Each Piece of Ad Mail, by Respondent Characteristics

		Was read right away	Saved: Saved to read later	Saved: Scanned quickly & saved	Thrown out: Scanned quickly	Thrown out: Not scanned	Put aside for others
		%	%	%	%	%	%
Total	(N=1057)	25	23	16	23	6	6
One adult households		33	27	15	21	3	1
Two adults		27	22	16	21	6	7
Three or more adults		17	23	16	27	9	7
No wage earners		30	21	12	28	6	3
One		29	22	19	17	5	6
Two or more		20	24	14	27	7	6
Under $15M		38	18	13	16	9	5
$15M-$24.9		21	26	18	24	6	4
$25M-$34.9		32	17	19	20	3	6
$35M and over		19	26	15	21	10	8
Less than h.s. grad.		27	17	14	33	4	4
High school grad.		25	26	20	17	6	6
Some college		25	27	13	18	10	6
College grad.		24	17	13	34	4	7
18-34		29	25	16	17	4	8
35-54		24	23	17	23	7	5
55 & over		25	20	14	27	8	5
Northeast		23	18	17	26	7	5
North Central		26	26	16	14	6	10
South		34	23	13	21	5	4
West		16	24	17	34	5	4
No ad mail next day		--	--	--	--	--	--
1 or 2 pieces		28	24	21	16	4	7
3 or more		24	23	14	26	7	5

Note: This table does not show "other" (1%) and "no answer" (1%).

Table A-11

Unfavorable Opinions About Ad Mail

	% Agree with Unfavorable Statements			% Disagree with Favorable Statements		
	Junk to throw out	Annoyed they get name	Are pushy, high-pressure	Not flattered by personal addressing	Not good quality & price	Not interesting, useful
Total	74%	61%	43%	77%	67%	62%
Under $15M	73	58	38	71	58	57
$15-$24.9	75	58	47	75	65	62
$25-$34.9	69	60	35	82	71	56
$35M & over	70	56	41	81	73	68
Ad mail pieces next day:						
none	72	58	36	75	60	59
1 or 2	72	54	43	74	64	63
3 or more	69	64	45	82	75	57
Northeast	68	57	45	79	70	59
North Central	74	65	43	79	65	62
South	75	56	38	70	60	58
West	83	68	46	83	76	74
Men	73	59	41	78	70	62
Women	74	61	43	77	66	62
18-34	68	57	41	70	65	57
35-54	72	60	45	82	71	64
55 & over	84	66	42	79	65	64
Less than h.s. grad.	75	59	40	67	55	54
High school grad.	76	62	44	79	68	60
Some college	70	59	45	78	68	63
College grad.	72	57	39	80	74	71

Table A-12

Summary of Kinds of Ad Mail Reported and Ad Mail Sent In

	REPORTED AD MAIL				AD MAIL SENT IN		Proportion of Reported Mail Sent in (See Note)
	By total sample		By those who sent in				
# Respondents	410/616	(67%)	283/410	(69%)	283		
# Pieces	1057		779		605		78%
-pol. cand.	-82		-68		-55		81%
-n.a. categ.	-51		-21				
TOTALS SHOWN BELOW	924 = 100%		690 = 100%		550 = 100%		80%
	#	%	#	%	#	%	
"NATION-WIDE" DIRECT MAIL	452	49	346	50	279	51	81%
Mail Order Goods	159	17	136	20	114	21	84%
multi gifts/gadgets	43	5	36	5	29	5	81%
single categ. catalogs	56	6	49	7	41	7	84%
single items	60	6	51	7	44	8	86%
Publishers	84	9	60	9	46	8	77%
Non-Profit (Pol., Rel.)	74	8	55	8	40	7	73%
Insurance, financial	53	6	40	6	31	6	78%
Coupons	35	4	25	4	22	4	88%
Misc. industries (auto, hotels, etc.)	21	2	16	2	13	2	81%
All other	26	3	14	2	12	2	86%
MASS MERCHANDISERS	225	24	166	24	145	26	87%
National chains (SPW)	74	8	48	7	40	7	83%
Discount (K mart, others)	57	6	47	7	46	8	98%
Supermarkets	61	7	44	6	37	7	84%
Other mass mdsrs.	33	4	27	4	22	4	[illegible]%
"LOCAL"/REGIONAL	247	27	178	26	127	23	71%
Stores	82	9	60	9	47	9	78%
Shoppers	26	3	22	3	19	3	86%
Services	63	7	46	7	32	6	70%
Educ./Entertainment	34	4	21	3	13	2	62%
Political issues, fundraising (excluding pre-election cand. mail	16	2	8	1	4	1	50%
Other (relig. & misc.)	26	3	21	3	12	2	57%

Note: 69% of those who received ad mail sent us their ad mail. The last column above shows what percentage of their reported ad mail in each category they sent in.

Table A-13

Detailed Array of Ads in Each Category
(Raw numbers)

	REPORTED AD MAIL		AD MAIL SENT IN
	By all	By those who sent	
TOTAL PIECES OF AD MAIL	1057	779	605
"NATION-WIDE" MAIL ADS	(452)	(346)	(279)
MAIL ORDER GOODS	(159)	(136)	(114)
Multi Gifts/Gadgets	(43)	(36)	(29)
Single Category Catalogs	(56)	(49)	(41)
Women's/girls' apparel	4	4	3
Men's/boys' apparel	5	4	4
Leisure/sporting goods	7	7	4
Women's & men's apparel	6	6	5
Christmas food gifts	15	15	13
Recordings/Music/TV	6	3	3
Office products	8	7	6
Collectables (coins, etc.)	5	3	3
Single Items, General Mdse.	(60)	(51)	(44)
General mdse. (luggage, etc.)	37	34	29
Oil company mail offers	15	11	9
Other credit card mail offers	8	6	6
PUBLISHERS	(84)	(60)	(46)
Magazine subscription solicitations	44	31	21
Books, encyclopedias	28	21	18
Newspaper sub. solicitations (Wall St. Journal, etc.)	5	2	2
Other	7	6	5
NON-PROFIT	(74)	(55)	(40)
Military	1	1	1
Religious (see local)	21	19	15
National (Girl Scouts) - "fraternal"	13	7	5
National political issues	21	15	10
Charities	18	13	9
INSURANCE, FINANCIAL	(53)	(40)	(31)
Financial: investments, credit companies	11	9	6
Insurance	42	31	25
COUPONS	(35)	(25)	(22)
MISCELLANEOUS INDUSTRIES	(21)	(16)	(13)
Hotels, resort areas, rec. parks (See local)	5	4	4
Real estate	3	3	2
Automotive: mf. rebates "see our model"	13	9	7
ALL OTHER NATIONAL	(26)	(14)	(12)
Business seminars	4	3	3
Other educational	3	1	1
Free samples	3	2	2
Other	16	8	6

Table A-13, cont'd

	REPORTED AD MAIL		AD MAIL SENT IN
	By all	By those who sent	
TOTAL MASS MERCHANDISERS	(225)	(166)	(145)
NATIONAL CHAINS	(74)	(48)	(40)
Sears	34	27	22
JC Penney	17	9	8
Montgomery Ward	23	12	10
DISCOUNT CHAINS	(57)	(47)	(46)
K mart	22	18	17
Other (e.g. Zayre, Target, Walmart, etc.)	35	29	29
SUPERMARKETS	(61)	(44)	(37)
A&P	1	1	1
Safeway	1	1	1
Kroger	10	9	8
Winn-Dixie	2	2	2
Pathmark	1		
Other (not listed)	46	31	25
OTHER MASS MERCHANDISERS	(33)	(27)	(22)
Home centers (Lumber, hardware, etc.)	15	13	10
Drugstores	9	8	8
Radio Shack	9	6	4
LOCAL	(247)*	(178)*	(127)*
TOTAL STORES	(82)	(60)	(47)
Department stores	40	26	21
All other stores	(42)	(34)	(26)
Women's/girls' apparel	7	6	6
Men's/boys' apparel	2	1	1
Furniture	13	9	6
Pizza parlors/restaurants	5	4	2
Deli	1	1	1
Other	14	13	10
SHOPPERS	(26)	(22)	(19)
SERVICES	(63)	(46)	(32)
Auto repair	4	2	2
Lawn care/landscaping	4	4	4
Construction	4	3	2
Carpet cleaners	3	3	1
Health clubs	2		
Medical/health: hospitals, doctors, dentists	10	9	7
Public utilities	18	14	9
Financial: banks, investments, advisory services	8	4	2
Other	10	7	5

* Excludes candidate mail.

Table A-13, cont'd

	REPORTED AD MAIL		AD MAIL SENT IN
	By all	By those who sent	
EDUCATIONAL/ENTERTAINMENT/"CULTURAL"	(34)	(21)	(13)
Colleges	16	10	6
Adult education	2	2	1
Special schools, programs for children	5	2	
Other	1	1	1
Cable Ads (Radio/TV programs advertising)	3	2	2
Other	2	2	1
Cultural/entertainment (galleries, opera, etc.)	5	2	2
POLITICAL*	(16)	(8)	(4)
x Candidates for national office	30	27	22
x Candidates for state, local	52	41	33
Local, state issues/fundraising	14	7	4
Other	2	1	
OTHER (LOCAL)	(26)	(21)	(12)
Religious	14	12	4
Vacation resorts	7	4	4
Other	3	3	2
Mixed coupons (not double coded)	2	2	2

* Excluding items x'd.

TOTALS			
Classified items	924	690	550
+ candidate mail	82	68	55
+ n.a. for classif.	51	21	—
PIECES OF AD MAIL	1,057	779	605
RESPONDENTS	410	283	283
	(Total among 616 who reported ad mail)	(Total who sent us their ad mail)	

Table A-14

Distribution of Interviews and Pieces of Ad Mail by Day of Week

INTERVIEWS				AD MAIL		
				Distrib. of ad mail through the week	Average number of pieces each day	
First Interview*		Call-back			Total Call-backs	Total who received ad mail
N=	(756)		(616)	(1057)		
Sunday	17%	Monday	17%	18%	1.9	2.6
Monday	16	Tuesday	19	20	1.9	2.6
Tuesday	17	Wednesday	18	21	2.0	2.9
Wednesday	16	Thursday	17	16	1.6	2.5
Thursday	16	Friday	18	15	1.4	2.5
Friday	18	Saturday	11	10	1.5	2.2

* Since one of the purposes of the first interview was to alert respondents to hold the next day's mail, these were conducted every day except Saturday.

Table A-15

Characteristics of Respondents in Successive Samples
(First interview *vs*. call-backs;
ad mail recipients *vs*. those who sent in)

	First Interview	Call-back Interview	Received Ad Mail	Sent in Ad Mail
N=	(756)	(616)	(410)	(283)
	%	%	%	%
Men	22	21	22	22
Women	78	79	78	78
Under $15M[a]	27	27	22	21
$15M-$24.9	29	30	30	29
$25M-$34.9	25	25	25	26
$35M & over	19	18	23	24
Northeast	27	26	25	28
North Central	27	30	30	27
South	30	29	29	29
West	15	14	15	16
One adult	20	20	19	19
Two adults	59	59	59	61
Three or more	21	21	22	20
No full-time wage earners	21	20	19	20
One	48	48	47	45
Two or more	31	32	34	35
18-34	35	36	32	29
35-54	37	38	41	41
55 & older	28	26	26	30
Less than h.s. grad.	16	15	14	13
High school grad.	47	48	45	46
Some college	21	23	25	25
College grad.	16	14	16	16
No ad mail	n.a.	33	--	--
1 or 2 pieces	n.a.	38	58	52
3 or more	n.a.	28	42	48
Most favorable to ad mail[b]	30	32	31	30
Somewhat	18	19	18	17
Least favorable	42	40	43	43
Read yesterday[c]	73	73	75	76

[a] Excluded no answers from percentage base for income. No answers not shown for other tabs.

[b] Scale of attitudes toward ad mail based on 6 item question about ad mail.

[c] Yesterday newspaper readership obtained in first interview.

Table A-16

Respondent Percentage Bases

	First Interview	Callback Interview	Received Ad Mail
Total	756	616	410
Men	167	130	88
Women	589	486	322
Under $15M	154	131	67
$15M-$24.9M	169	146	92
$25M-$34.9M	146	122	79
$35M & over	108	87	73
Northeast	207	162	101
North Central	204	182	122
South	225	179	120
West	112	86	63
One adult	148	122	77
Two adults	452	367	245
Three or more	156	127	88
No full-time wage earner	158	120	77
One	360	300	194
Two or more	235	195	138
18-34	264	223	133
35-54	278	233	168
55 & older	212	159	108
Less than h.s. grad.	124	94	58
H.S. grad.	345	293	184
Some college	160	139	101
College grad.	122	86	65
No ad mail	206	206	-
1 or 2 pieces	236	236	236
3 or more	174	174	174
Most favorable to ad mail	228	196	125
Somewhat favorable	139	114	74
Least favorable	314	245	175
Read yesterday	549	450	309

Note on Yesterday Readership

Yesterday newspaper readership figures are traditionally based on interviews conducted Tuesday-Saturday, to obtain Monday-Friday readership. The design of this study required a departure from this convention. In order to cover all mail delivery days (Monday-Saturday) in the callback interview, the first interview, in which yesterday readership was ascertained, was conducted on Sunday-Friday. Respondents who were interviewed on Sunday or Monday were treated as yesterday readers if they had read a newspaper on the previous Friday or Saturday.

TECHNICAL APPENDIX

Design of the Study

The study was carried out in three stages:

1. Preliminary telephone interviews with the first adult in the family who looks over the family's mail, covering behavior and attitudes.

2. Callback telephone interviews the next day (or later, as arranged with the respondent) to talk about the advertising mail received that day.

3. Respondents were asked to send in all of that day's advertising mail they did not wish to keep. They were sent a postage-free envelope for this purpose, a letter thanking them for their participation, and a new $2.00 bill as a token of appreciation.

Copies of the letter and the two questionnaires are in the Appendix.

Pretesting

The questionnaires and the study method were pretested in Chicago in July 1982 with 30 interviews. The questionnaires and method, with only minor changes, were later used for a pilot study conducted in Detroit in August, with 100 interviews. A slightly revised version of the questionnaires was used for the National study which was conducted between October 7 and November 3, 1982.

The Sample

In the National study 1,072 prospective respondents were contacted and 756 were interviewed. Of these, 671 (88.8%) agreed to be interviewed again the next day (or soon thereafter) to talk about the mail they received that day. Interviews were successfully completed with 616 of these respondents (91.8% of those who had agreed to be interviewed and 81.5% of those originally interviewed.)

The national probability telephone sample used for the study is a stratified proportioned sample, utilizing randomized procedures designed to allow all directory listed telephone households in the U.S.A. an equal opportunity of being selected. A total of 100 sample county points were employed, in urban, suburban and rural areas.

The sample is a two-stage sample consisting of 16 strata -- the four major geographic regions as defined by the U.S. Bureau of Census -- crossed by the four county sizes as defined by the Nielsen Company. The definitions of the regions and county sizes follows:

NORTH EAST

Maine
New Hampshire
Vermont
Massachusetts
Rhode Island
Connecticut
New York
New Jersey
Pennsylvania

NORTH CENTRAL

Ohio
Indiana
Illinois
Michigan
Wisconsin
Minnesota
Iowa
Missouri
North Dakota
South Dakota
Nebraska
Kansas

SOUTH

Delaware
Maryland
District of Columbia
Virginia
West Virginia
North Carolina
South Carolina
Georgia
Florida
Kentucky
Tennessee
Alabama
Mississippi
Arkansas
Louisiana
Oklahoma
Texas

WEST

Montana
Idaho
Wyoming
Colorado
New Mexico
Arizona
Utah
Washington
Oregon
California
Alaska
Hawaii

COUNTY SIZES

"A" = All counties belonging as of February 23, 1971 to the largest SMSAs (according to the 1970 Census of Population.)

"B" = All counties not included under A that are either over 150,000 population or in Metropolitan Areas over 150,000 population (according to the 1970 Census of Population.)

"C" = all counties not included under A or B that are either over 35,000 population or in Metropolitan Areas over 35,000 population (according to the 1970 Census of Population.)

"D" = All remaining counties.

The first stage consisted of drawing sample counties for each of the 16 strata. The universe counts (or population counts) were determined for each of the various 16 strata, as defined in Sales & Marketing Management's "Survey of Buying Power."

The telephone numbers drawn for the study were allocated to the various strata in proportion to their respective population percents to the continental U.S. (universe). Within each strata all counties were listed systematically in alphabetical order by state. A cross section sample of counties was drawn for each strata using an every nth county selecting process. This was accomplished by dividing the total number of listed counties by the number of allocated sample county points within each strata.

The second stage consisted of drawing the sampled telephone numbers within each selected sample county point. The telephone directories for each sample county were systematically listed. One or more telephone directories per county was then randomly selected for sampling of telephone numbers. The selected telephone directories were then sampled using an every nth telephone listing procedure. This was achieved by dividing the number of telephone listings required to be drawn for the particular county, by the total number of pages in the appropriate directory. The result represented the number of telephone numbers to be drawn per page. All sampled telephone numbers were placed on cards or dialing sheets with their respective sample county definitions labeled. Up to three attempts were conducted per number.

Because of the sample design, an equal number of contacts or completions were assigned to to each sample point. The various number of sample points within each strata (e.g., 14 sample points in the North East county size A strata) resulted in a projectable sample, for the nation as a whole.

The sample was modified to include unlisted households by rotating the last digit by a constant value. This system has a high probability of avoiding the costly task of calling banks of telephone numbers completely unassigned and also maximizes control of the sample by limiting interviewing to the specified sample points.

NATIONAL PROBABILITY SAMPLE

STRATA	COUNTY SIZE	PERCENT OF U.S.A. POPULATION		PERCENT OF SAMPLE	
Northeast		24.0%		24%	
	A		13.7%		14%
	B		6.7		6
	C		3.2		3
	D		0.4		1
North Central	A	27.7%	11.2%	28%	11%
	B		6.3		7
	C		4.9		5
	D		5.3		5
South	A	31.0%	6.0%	31%	6%
	B		9.5		10
	C		7.1		7
	D		8.4		8
West	A	17.3%	8.5%	17%	8%
	B		4.7		5
	C		2.6		3
	D		1.5		1
	TOTAL		100.0%		100.0%
TOTAL REGIONS	A		39.4%		39%
	B		27.2		28
	C		17.8		18
	D		15.6		15
	TOTAL		100.0%		100.0%

Henry Senft Research
76 South Bayles Avenue
Port Washington, NY 11050

Study No. 82-071-8
September 1982
I.D. No.________ (1-3)
Sample
Point No.________

DIRECT MAIL ATTITUDE STUDY
SCREENING

DESIGNATED RESPONDENT'S NAME____ DATE:________________

STREET ADDRESS:______________________________ CITY & STATE:________________________ ZIP CODE:________

TELEPHONE NUMBER__________________________________ INTERVIEWER:____________________

TIME INTERVIEW STARTED:__________________________ ENDED:________________________

Hello, I'm________________of________________, an independent marketing research company. We're conducting a poll on people's feelings about different kinds of advertising.

S1. Including yourself, how many adults age 18 or older live in your household?
(IF ONLY ONE ADULT, RECORD SEX IN S2, THEN GO TO MAIN QUESTIONNAIRE.)

One adult. . . . .( )4-1
2. . . . .( ) -2
3. . . . .( ) -3
4 or more. . . . .( ) -4

S2. And what is your position in the household:

Wife, lady of house. . . . .( )5-1
Husband, man of house. . . .( ) -2
Mother of household head . .( ) -3
Father of household head . .( ) -4
Daughter . . . .( ) -5
Son. . . . .( ) -6
Other Male Adult . . . . . .( ) -7
Other Female Adult . . . . .( ) -8

S3. After the postman delivers the mail, who is usually the first person in the household to look it over?

Respondent ("I am"). . . . .( )6-1 GO TO MAIN QUESTIONNAIRE
My husband . . . .( ) -2)
My wife. . . . .( ) -3) SKIP TO Q. S6
My mother. . . . .( ) -4)
My father. . . . .( ) -5)
Daughter . . . .( ) -6 (ASK Q. S4
Son. . . . .( ) -7 (
Other male adult . . . .( ) -8) SKIP TO Q. S6
Other female adult . . . .( ) -9)
Different people/it varies . . . .( ) -0
Other:______________________________

IF RESPONDENT SAYS "DIFFERENT PEOPLE", "IT VARIES", ETC. INTERVIEW FEMALE HEAD; IF NO FEMALE HEAD INTERVIEW MALE HEAD. RECORD DESIGNATED RESPONDENT IN S6 AND IN S3.

IF "SON" OR "DAUGHTER" IS NAMED IN Q. S3, ASK:

S4. How old is your son (or daughter)?__________________ 7- 8-
IF UNDER 18, ASK Q. S5
IF 18 OR OVER, ASK Q. S6

S5. Who is usually the first adult in the household to look over the mail?__________________________ 9-
(Relation to Respondent)

S6. May I speak to__________________(ADULT NAMED IN S3 or S5)
(Relation to Respondent)

IF PERSON NAMED IS NOT IMMEDIATELY AVAILABLE, ARRANGE FOR CALLBACK.
TIME TO CALL BACK:__________________ PERSON TO ASK FOR:______________________________

Henry Senft Research

Direct Mail Study
September 1982

MAIN QUESTIONNAIRE

(IF QUALIFIED RESPONDENT IS NOT FIRST PERSON ANSWERING PHONE, REPEAT INTRODUCTION AT TOP OF SCREENING SHEET.)

1. Are you usually at home when the mail arrives, do you pick it up when you get home from work, or what?

At home when mail arrives. . . . .( )10-1
Pick it up when I get home from work . . . .( ) -2
Other____

2. And when you pick up the mail, what is usually the next thing you do -- do you read through all of it right away, do you read some things and put other things aside till later, do you read some things and throw other things away, or do you put it all aside till later?

Read through all of it. . . . .( )11-1 (GO TO Q. 4)
Read through some, put other things aside . . . .( ) -2 (ASK Q. 3a)
Read some things, throw other things away . . . .( ) -3 (ASK Q. 3b)
Put it all aside till later . . . .( ) -4 (GO TO Q. 4)

3a. What kinds of mail do you put aside till later? (RECORD ANSWER BELOW)
3b. What kinds of mail do you throw away?

12-
____13-
14-
____15-

4. Would you say that you get some kind of advertising in the household mail at least once a week? This could be for charities, people selling something, coupons, etc.
IF YES: would you say you get mail advertising about once a week, several times a week or almost every day?

Yes, get mail advertising about once a week. . . . .( )16-1
Yes, get mail advertising several times a week . . . .( ) -2
Yes, get mail advertising almost every day . . . .( ) -3
No, get mail advertising less often. . . . .( ) -4

5. Have you ever contacted any advertiser or the Direct Mail Association to ask that your name be taken off their mailing list?

Yes. . . . .( )17-1
No . . . .( ) -2

6. Just making a rough guess, about how many pieces of mail advertising do you get in the household mail in an average week? Would it be one or two pieces, three to four pieces, five to ten, or more than ten pieces a week?

1-2 pieces . . . .( )18-1
3-4 pieces . . . .( ) -2
5-10 pieces. . . . .( ) -3
More than 10 pieces. . . . .( ) -4

7. I understand that most of the time you are the first person in your household to see the mail. Suppose that the day's mail included a piece of advertising addressed to someone else in your household. Would you save it for that person regardless, or would you throw it out if you were sure it was something the other person didn't want?

Would save it regardless . . . . .( )19-1
Would throw it out . . . .( ) -2
Would do both/depends on ad. . . .( ) -3

8. What kinds of companies or organizations send you mail advertising?
(DO NOT READ LIST, BUT ASK "ANY OTHERS?" AFTER EACH RESPONSE.)
IF RESPONSE IS UNCLEAR ASK: What kind of company or organization mails it?

Book clubs, book companies. . .( )20-1
Charities, school groups or other fund-raising groups . .( ) -2
"Collectables" (Coins, plates, Franklin Mint etc.) .( ) -3
Coupons for food or grocery products. . . . .( ) -4
Credit Card companies (Visa, American Express, etc.) . . .( ) -5
Department stores . . . .( ) -6
Insurance companies, banks. . .( )-7
Magazines . . . .( )-8
Mail order companies. . . . . .( )-9
Record, tape or cassette clubs or companies. . . . . .( )-0
Supermarkets. . . . .( )-x
Other (SPECIFY)
____
____________________________ 21-

9. I am going to read a few statements about unrequested advertising sent through the mail. After I read each one, please tell me whether you mostly agree or mostly disagree with that particular statement.

	Mostly Agree	Mostly Disagree
At least half of the ads I get through the mail is interesting or useful.	( )22-1	( )-2
Mail ads tend to be pushy, high pressure ads.	( )23-1	( )-2
Companies that sell only through the mail usually offer high quality merchandise at very reasonable prices.	( )24-1	( )-2
Ads sent through the mail just mean that I have more junk to throw out.	( )25-1	( )-2
There is something flattering about getting advertising which is personally addressed to me.	( )26-1	( )-2
Sometimes I'm annoyed that all these advertisers get my name.	( )27-1	( )-2

10. Sometimes the same ad is distributed in more than one way. For example, the Sunday newspaper might contain a booklet advertising a department store sale, and the same booklet might also be sent through the mail. How would you rather get a department store ad of this type — through the mail or in a daily newspaper?

Through the mail. . . . . ( )28-1
In a daily newspaper. . . . . ( ) -2
Either way, no preference . . . . ( ) -3
Other: ______________________________

11. Now I'd like to read four short statements about advertising. After I read each one, please tell me whether that statement is more true of mail advertising or daily newspaper advertising.

	MORE TRUE OF:	
	MAIL ADVERTISING	NEWSPAPER ADVERTISING
Gets to me when I'm in the mood to read	( )29-1	( )-2
Advertises a lot of silly gadgets nobody really needs	( )30-1	( )-2
Makes it easy to compare prices at different stores	( )31-1	( )-2
Makes products look a lot better than they really are	( )32-1	( )-2

12. Do you also get advertising that doesn't come through the mail but is just left at your door?

Yes. . . . .( )33-1 ASK Q. 13
No . . . .( ) -2 GO TO Q. 14

13. What kind of advertising is this? (EXPLAIN IF NECESSARY: "I mean for what kind of stores?")

______________________ ______________________ ______________________ 34-
35-
______________________ ______________________ ______________________ 36-
37-

14. Do you prefer grocery ads in daily newspapers or grocery ads left at your door?

Prefer grocery ads in newspapers. . .( )38-1
Prefer grocery ads left at door . . .( ) -2
DO NOT READ: No Preference . . . .( ) -3

Finally, I'd like to ask you a few questions just for classification purposes.

15. Since last (DAY OF INTERVIEW) have you read or looked at a daily newspaper?

Yes. . . . .( )39-1 ASK Q. 16
No . . . .( ) -2 GO TO Q. 17

IF INTERVIEW IS TUESDAY THRU SATURDAY ASK 16a. IF SUNDAY OR MONDAY ASK 16b.

16a. When was the last time you read or looked at a daily paper?

Today. . . . .( )40-1 (ASK: And when was the last time before today?
Yesterday. . . . . . . ( )-2
Earlier than yesterday ( )-3
Yesterday . . . .( ) -4
Earlier than yesterday. . . . . .( ) -5

IF INTERVIEW IS ON SUNDAY OR MONDAY ASK:

16b. What day did you last read or look at a daily paper before today?

Mon ( )40-6   Wed ( )-8   Fri ( )-0
Tue ( ) -7   Thu ( )-9   Sat ( )-x

17. About how long have you lived at your present address? (DO NOT READ LIST)

Less than 6 months. . . . .( )41-1   1 to 3 years. . . . . ( )-3
6 months to 1 year. . . . .( ) -2   More than 3 years . . . . . . ( )-4

18. What was the last grade of school or college you completed?

Less than high school graduate . . ( )42-1   1 to 3 years college. . . . . ( )-3
High school graduate . . . . ( ) -2   College graduate or beyond. . ( )-4

19. How old are you?

18 - 24 years. . . . ( )43-1   45 - 54 years. . . . ( )-4
25 - 34 years. . . . ( ) -2   55 - 64 years. . . . ( )-5
35 - 44 years. . . . ( ) -3   65 years or older. . ( )-6

20. How many people are in your family, living at home, including yourself?__________44-

21. How many full-time wage earners are there?__________________________________45-

22. Just making a rough guess, how much would you say your household spends per week on groceries — less than $50, between $50 and $75, or more than $75?

Less than $50 . . . . ( )46-1
Between $50 and $75 . ( ) -2
More than $75 . . . . ( ) -3

23. Was your total family income for 1981 under $25,000 or was it $25,000 or more?

Under $25,000   ( )47-1 $25,000 or more   ( )-4

Would that be under or over $15,000?   Would that be under or over $35,000?
Under $15,000   ( ) -2 $25,000-$34,999   ( )-5
$15,000-$24,999   ( ) -3 $25,000 or more   ( )-6

Thank you for your help. I would be interested in talking to you again, about the unsolicited mail you receive tomorrow. I would like to send you a two dollar bill in the mail tonight, just as a token of our appreciation, and call you back tomorrow to talk to you about the mail you have received earlier in the day. And after the interview, I would like you to send me all the mail you do not wish to keep (not including the personal mail, of course.) I will send you a stamped, addressed envelope for this purpose.

Remember, please keep the mail for tomorrow only, and please keep the envelopes it comes in.

(INTERVIEWER: If callback is not tomorrow, but a later day, tell respondent to keep the mail for that day only, and to keep all envelopes.)

AGREES TO SAVE MAIL (48-1)   CALL BACK ON:______________   REFUSES ( )-2
DAY-DATE-TIME

RECORD DAY OF THIS INTERVIEW   Sun ( )49-1   Mon ( ) -2   Tue ( )-3   Wed ( )-4   Thu ( )-5   Fri ( )-6

Sample Point No.______________ 50-51-52
ZIP Code______________ 53-54-55
Region 56-
City Size 57-

END CARD 1

Henry Senft Research
76 South Bayles Avenue
Port Washington, NY 11050

Study No. 82-071-B
September 1982
I.D. No__________ (1-3)

DIRECT MAIL ATTITUDE STUDY:
CALL BACK QUESTIONNAIRE

RESPONDENT'S NAME:______________________________ DATE:__________

STREET ADDRESS:______________________ CITY & STATE:__________ ZIP CODE:__________

TELEPHONE NUMBER:______________ INTERVIEWER:______________

TIME INTERVIEW STARTED:______________ ENDED:______________

Hello, this is________of______________. I talked to you yesterday (the other day) and you said you'd save today's mail. Is this a convenient time for me to ask you a few questions about it or should I call back a little later? (When would be a better time?) (IF LATER, CALL BACK:______________)

1. Could you bring all of today's mail to the phone -- even the catalogs and the mail you threw out without opening?

   How many pieces of mail are there, all together?__________ 4- 5-

2. Do you usually get about this much mail every day or was this more or less than usual?

   About the same as usual ( ) 6-1
   Usually get more ( ) -2
   Usually get less ( ) -3

3. I need a brief description of each piece. First, put aside all the personal letters from family or friends. How many personal letters are there? How many regular magazines are there?
   No. of personal letters__________7- No. of regular magazines__________8-

4. Now, I need a brief description of each of the rest. Let's start with the biggest. ASK ALL THE FOLLOWING QUESTIONS FOR EACH PIECE OF MAIL. WRITE IN OR CHECK OFF THE ANSWERS IN THE GRID ON THE NEXT PAGE.

   a. What is the company or store that sent it out?
   b. What is it about? (Product/service or other purpose)
   c. Is it in an envelope?
   d. IF IN AN ENVELOPE: What is in the envelope?

      IF NOT IN AN ENVELOPE:

      e. What is it?
      f. Did it come folded together with other items?
      g. How many items came folded together? Which ones were they?

   h. About how many pages or sheets are there in it?
   i. About how big is it? (Approximate inches.)
   j. Are the contents printed in black and white or color?
   k. Excluding the envelope, is it printed on the kind of paper that daily newspapers are printed on or more like the paper that magazines are printed on?
   l. Is it addressed to you by name, to someone else in the household, to the family, to "resident" or "occupant", or does it have a wrong name on it?

4a. Who sent it? (Company/store/orgn?)

9-
ITEM: A: ____________________ 10-
11-
B: ____________________ 12-
13-
C: ____________________ 14-
15-
D: ____________________ 16-
17-
E: ____________________ 18-

b) What is it about? (Product/service/other?)

19-
A: ____________________ 20-
21-
B: ____________________ 22-
23-
C: ____________________ 24-
25-
D: ____________________ 26-
27-
E: ____________________ 28-

c. Is it in an envelope?

	A	B	C	D	E
	29-	30-	31-	32-	33-
Yes (ASK d)	( )-1	( )-1	( )-1	( )-1	( )-1
NO (ASK e)	( )-2	( )-2	( )-2	( )-2	( )-2

IF IN ENVELOPE:
d) What is in the envelope?

	34-	35-	36-	37-	38-
Letter	( )-1	( )-1	( )-1	( )-1	( )-1
Card	( )-2	( )-2	( )-2	( )-2	( )-2
Brochure	( )-3	( )-3	( )-3	( )-3	( )-3
Coupons	( )-4	( )-4	( )-4	( )-4	( )-4
Return env.	( )-5	( )-5	( )-5	( )-5	( )-5
Bills	( )-6	( )-6	( )-6	( )-6	( )-6
Other ____________________					

IF NOT IN AN ENVELOPE
e. What is it?

	39-	40-	41-	42-	43-
Circular	( )-1	( )-1	( )-1	( )-1	( )-1
Catalog	( )-2	( )-2	( )-2	( )-2	( )-2
Fldr/brochure	( )-3	( )-3	( )-3	( )-3	( )-3
Shopper guide	( )-4	( )-4	( )-4	( )-4	( )-4
Card	( )-5	( )-5	( )-5	( )-5	( )-5
Other ____________________					

f. Did it come folded together with other items (like sections of a newspaper?)

Yes...( )44-1 ASK Q. g)
No....( ) -2 SKIP TO Q. h)

g. How many items came folded together? ____ 45-

Which ones are they?
Item A ( )46-1   Item D ( )-4
Item B ( ) -2   Item E ( )-5
Item C ( ) -3

ASK ALL RESPONDENTS "h" TO "l".

h. How many pages or sheets in it?

47-
Item A ____48-
49-
Item B ____50-
51-
Item C ____52-

53-
Item D ____54-
55-
Item E ____56-

i. How big is it? (IN INCHES)
IF IN ENVELOPE, NOTE ENVELOPE SIZE ONLY.

Item A ___X___ 57-   Item D ___X___ 60-
Item B ___X___ 58-   Item E ___X___ 61-
Item C ___X___ 59-

j.

Printed in B&W or color?	A	B	C	D	E
	64-	65-	66-	67-	68-
Blk & White	( )-1	( )-1	( )-1	( )-1	( )-1
Color	( )-2	( )-2	( )-2	( )-2	( )-2
Both	( )-3	( )-3	( )-3	( )-3	( )-3

k.

Printed on newsprint or magazine paper?	69-	70-	71-	72-	73-
Newsprint	( )-1	( )-1	( )-1	( )-1	( )-1
Magzn paper	( )-2	( )-2	( )-2	( )-2	( )-2
Letter paper	( )-3	( )-3	( )-3	( )-3	( )-3
Card stock	( )-4	( )-4	( )-4	( )-4	( )-4

l.

How is it addressed?	74-	75-	76-	77-	78-
You by name	( )-1	( )-1	( )-1	( )-1	( )-1
Other person in household	( )-2	( )-2	( )-2	( )-2	( )-2
To family by name	( )-3	( )-3	( )-3	( )-3	( )-3
Resident/occup. (at home address)	( )-4	( )-4	( )-4	( )-4	( )-4
Postal rate patron (no address)	( )-5	( )-5	( )-5	( )-5	( )-5
Other ____________________					SKIP 79- 80-

END CARD 2

5. Excluding the personal mail — the letters from friends or family — I'd like to ask you what happened to each piece of mail. Let's start with ________________ (NAME THE FIRST PIECE LISTED ON THE GRID.) Did you....
   a) Read it through right away?
   b) Put it aside to read through later?
   c) Put it aside for someone else to read or gave it to someone else?
   d) Scanned it quickly and then saved it?
   e) Scanned it quickly and threw it away?
   f) Or threw it away without even scanning,
   g) Or what....? (RECORD ANSWERS BELOW)

Item	Read through right away a)*	Put aside to read later b)*	Gave to someone else c)	Scanned quickly and saved d)*	Scanned and threw away e)*	Threw away without scanning f)	Something else (PLEASE SPECIFY:) g)*
A.	( ) 4-1	( ) -2	( ) -3	( ) -4	( ) -5	( ) -6	________
B.	( ) 5-1	( ) -2	( ) -3	( ) -4	( ) -5	( ) -6	________
C.	( ) 6-1	( ) -2	( ) -3	( ) -4	( ) -5	( ) -6	________
D.	( ) 7-1	( ) -2	( ) -3	( ) -4	( ) -5	( ) -6	________
E.	( ) 8-1	( ) -2	( ) -3	( ) -4	( ) -5	( ) -6	________
F.	( ) 9-1	( ) -2	( ) -3	( ) -4	( ) -5	( ) -6	________
G.	( )10-1	( ) -2	( ) -3	( ) -4	( ) -5	( ) -6	________
H.	( )11-1	( ) -2	( ) -3	( ) -4	( ) -5	( ) -6	________
I.	( )12-1	( ) -2	( ) -3	( ) -4	( ) -5	( ) -6	________
J.	( )13-1	( ) -2	( ) -3	( ) -4	( ) -5	( ) -6	________

* IF ANY OF THE NON-PERSONAL MAIL WAS READ, SCANNED OR SAVED [a), b), d), e), g], ASK FOR EACH PIECE:

6. You said you did not throw away ________________ unopened. What do you think you might do about it?
   (PROBE FOR "SHOP", "BUY", "ORDER", "THINK ABOUT IT" OR OTHER KINDS OF BEHAVIOR THAT MIGHT BE ANTICIPATED.) (ASK FOR EACH PIECE LOOKED AT OR SAVED.)

ITEM NO.

_____ ______________________________________ 14-

_____ ______________________________________ 15-

_____ ______________________________________ 16-

_____ ______________________________________ 17-

______________________________________ 18-

USE BACK OF PAGE IF MORE THAN FIVE ITEMS MENTIONED.

7. Excluding the personal mail, is there any word — or perhaps two or three words — that you use to refer to the rest of the mail you get?

______________________________________ 19-

RECORD DAY OF WEEK	Mon ( )20-1	Wed ( )-3	Fri ( )-5
INTERVIEW WAS DONE:	Tue ( ) -2	Thu ( )-4	Sat ( )-6

END CARD 3

Thank you very much. Have you received the envelope from us yet? (IF NO: You will receive a letter with a gift and a return envelope.) Please use the return envelope to send us all of today's mail you do not wish to keep. I mean the mail we have just been talking about. Please send it to us with the envelopes or folded together the way it came, if possible.

HSR

HENRY SENFT RESEARCH
ASSOCIATES, INC./ 76 SO. BAYLES AVENUE, PORT WASHINGTON, N.Y. 11050/516-944-6888

October 1982

Thank you for your help.

We appreciate your agreeing to save your mail for one day and letting us telephone you to ask a few questions about it.

We would like to request that you send us all of that day's mail that you do not wish to keep -- excluding personal mail, of course -- after we have talked to you about it.

We are enclosing a postage-paid, addressed envelope for this purpose.

Sincerely yours,

Henry Senft
President

P. S. The enclosed crisp two dollar bill is just a token of our appreciation.

METHODOLOGICAL NOTE

The following tables are provided for the reader who is interested in obtaining a quick estimate either of the stability of a given percentage or of the significance of the difference between two percentages.

Confidence Intervals for a Given Percentage
(at the 95% confidence level)

N (Base for %)	Reported Percentage 10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	2.6	3.5	4.0	4.3	4.4
250	3.7	5.0	5.7	6.1	6.2
200	4.2	5.5	6.3	6.8	6.9
150	4.8	6.4	7.3	7.8	8.0
100	5.9	7.8	9.0	9.6	9.8
50	8.3	11.1	12.7	11.6	13.9
25	11.8	15.7	18.0	19.2	19.6

Example: If a report shows that 20% of all respondents (when N = 500) answer in a particular way, the chances are about 95 out of 100 that the true value is 20% + or - 3.5%, that is, that the range 23.5% - 16.5% contains the true value.

Significance of Differences Between Percentages
(95% confidence level)

Average of the Bases of Percentages Being Compared	Average of Reported Percentages 10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	3.7	4.9	5.7	6.1	6.2
250	5.2	7.1	8.1	8.6	8.8
200	5.9	7.8	8.9	9.6	9.8
150	6.8	9.1	10.3	11.0	11.3
100	8.3	11.0	12.7	13.6	13.9
50	11.7	15.7	18.0	19.2	19.7
25	16.7	22.2	25.5	27.2	27.7

Example: A report shows that 33% of all respondents from 30 to 39 years of age use a certain product and that only 27% of all respondents in the 40-to-49 age group use that product. Could this difference be due to chance?

In this example assume an average base of 500 for the represented percentages. The average of the percentages (33 + 27) equals 30% and the difference between the percentages is 6%.

Since 6% is greater than 5.7 (the figure in the table for this base and percentage) the chances are about 95 out of 100 that the product is used more by the 30-39 age group.

The table values are based on an assumption of simple random sampling. The figures may be too large if a stratified sampling technique was used and probably are too small if a cluster sampling technique was utilized. (For formulas used, see McNemar, Psychological Statistics, pages 54, 60.) The second table should be used with extreme caution if the bases being averaged are very different.

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Research Report

HOW AMERICA SHOPS AND BUYS

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

HOW AMERICA SHOPS AND BUYS

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the Newspaper business and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

June 1983

INTRODUCTION

Big markets are built from the shopping and buying decisions of relatively small percentages of men and women in the average week. Only a fraction of the buying public is in the market shopping for or buying items in specific categories offered by retailer marketers. This insight into the retail market was defined as the "thin market," in a study conducted in 1965 for NAB. Observed change in the living patterns of Americans since then suggested that it would be worthwhile to bring this study up to date and expand its coverage to develop additional insights into consumer behavior.

In May 1982, therefore, the Newspaper Advertising Bureau commissioned the Response Analysis Corporation of Princeton, New Jersey to conduct an expanded follow-up study of American shopping and buying patterns. Interviews with male and female heads of households were conducted in two waves; a self-administered questionnaire was also used to supplement the data gathered by phone. Information on plans to shop and buy collected during the first round of interviews was checked against actual shopping or buying during the week between the two waves of interviewing. Specific shopping places and items purchased were probed in the interviews and coded subsequently.

The results of this study were initially presented to the National Retail Merchants Association in January 1983. Audio-visual presentations of the principal findings are available for showing through NAB's Retail Department.

The study was supervised and the research report written by Charles Lehman of NAB's Research Department.

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HIGHLIGHTS

1. In an average week, very few people are in the market for any specific kind of merchandise.

   Women's wear generates more shopping and buying than any other category of general merchandise. Nevertheless, out of every 1,000 adults, only 40 will buy any kind of women's footwear in the average week; only 28 will buy any kind of women's slacks, jeans or shorts; and only 21 will buy dresses.

2. The prospect status of individual consumers changes rapidly and unpredictably.

   Methodical planning is uncommon among American consumers. For example, while 40 adults out of every 1,000 will buy women's shoes in the average week, only 15 are planning to buy women's shoes during the same period.

   Out of every 100 who do plan to buy women's shoes within a week, only 44 will get around to shopping for them within that time, and only 31 will actually buy. Most of the remainder still plan to buy sometime, but about one in five (19%) drops plans for the time being.

   Fortunately, people also move into the market fast. Out of all general merchandise purchases made this week, 85% were not planned as much as seven days in advance.

3. American shoppers are highly mobile. They shop in all kinds of shopping areas and all kinds of stores.

   More than 95% of all general merchandise shopping is done by car. More than 55% of the adults completing the questionnaire say that they have convenient access to three or more shopping centers or malls, and 44% have visited three or more centers within the past three months.

   In a typical two-week period, 46% of all general merchandise purchasers buy something from a shopping center; 35% buy in a local neighborhood shopping area; 31% buy downtown; and another 31% from free-standing stores on the highway.

   For any major category of merchandise, consumers buy from many types of outlets. For example, about 34% of all women's wear items (excluding shoes) are bought from women's specialty stores, 24% from department stores, 17% from discount stores, 14% from national chains. The remaining women's wear business is split up among other kinds of specialty stores, factory outlets, mail and phone orders, supermarkets and drugstores.

4. People with high incomes are the best customers for most kinds of merchandise, but buyers represent a broad spectrum of the population.

People with household incomes under $30,000 (73% of all households) buy 71% of all women's wear items, 59% of all men's wear items, 67% of all stationery and gift items, and 54% of all books and records.

5. Store loyalty is limited among today's consumers.

When asked to describe their personal clothes shopping habits by ranking three statements out of six, 50% of those completing the questionnaire agree that, "I usually shop in several stores to find what I like best." And 42% say that, "I usually shop in several stores to get the best price." Half (50%) say that they "usually go to the closest store just because it's convenient." Nevertheless, 37% indicate that "I have one favorite store where I usually buy."

6. Taken together, these five points argue that any modern retailer's advertising strategy should include frequent advertising for a wide variety of items.

This is a volatile mix: a small, constantly changing, very mobile group of hot prospects who don't plan very far in advance and who have only limited store loyalty. "Image" advertising doesn't appear to motivate them as well as ads with specific prices for specific items.

7. Different kinds of stores have varying degrees of success in converting shoppers into buyers.

Taking women's wear as an example, the ratio of buyers to shoppers is 61% for those who shopped in national chains, compared with 69% in traditional department stores, 74% in discount stores and 78% in women's specialty stores. The specialty store's success in this area may depend on better-trained, more effective sales people and on fewer customers per sales person.

8. The mix of merchandise bought in different kinds of stores shows wide variations.

"Apparel," in the broadest sense, accounts for 73% of all merchandise bought in traditional department stores and 63% of all items bought in national chains, but only 48% of the items bought in discount stores.

9. People will travel considerable distances to shop and buy, especially for individual items of $300 and over.

Among those reporting a major purchase within the past six months, six out of ten (63%) say that they traveled five miles or more, and 35% traveled ten miles or more. Their most common reason for selecting the store where they bought was price: 33% said "they advertised a good price on what I needed" and another 33% said "I shopped several stores, and they had the best price."

10. Advertising stimulates unplanned purchases--especially newspaper advertising.

Among those who recall making unplanned purchases in the past month or so, about four out of ten admit that an ad brought the purchased item to their attention. The advertising source cited most often (by 60%) is the newspaper; none of the other five prelisted media (television, radio, magazine, direct mail and "something left at the door") was checked by more than 17%.

11. Every weekday the daily newspaper reaches seven out of ten retail customers.

On the average, 72% of the shoppers patronizing thirteen types of retail outlets read the daily newspaper on a typical weekday.

DETAILED FINDINGS

I. INFLUENCES SHAPING TODAY'S RETAIL MARKET

American patterns of shopping and buying reflect economic, social and technological forces impinging on the lives of consumers. Over the years, there have been many changes in shopping and buying habits. Here are some developments that helped to bring about those changes:

A) The rise in car ownership

Between 1950 and 1980, the proportion of United States households with one or more cars available rose from 59% to 87% (Chart A). The importance of this increase is underscored by the fact that 96% of those completing the questionnaire say that when they go shopping they usually travel by car.[1] Even at lower socio-economic levels, nine out of ten report using a car for shopping (Table 1).

B) The increase in the number of women who work outside the home

The percentage of women age 18 to 64 in the labor force rose from 36.9% in 1950 to 60.9% in 1980.[2] This profound change in the status of women has many implications for retailers. Women have more disposable income. They are more likely to be drivers and car owners, and they need larger wardrobes as working women than as housewives.

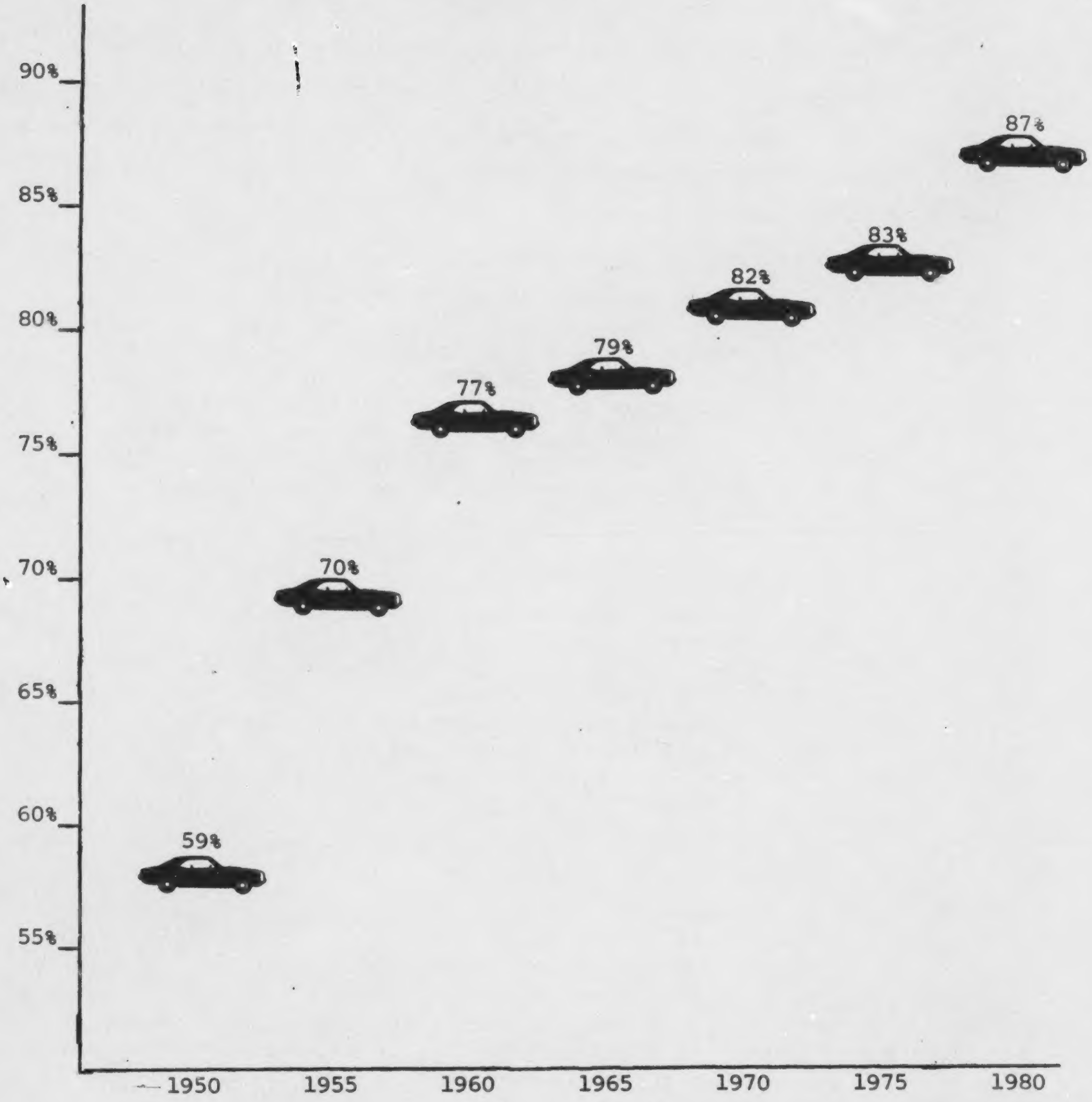
---

[1] The proportion of adults with access to a car is higher than the proportion of households with cars. This is because the level of car ownership is significantly higher in households of two or more persons, which account for 77% of all households but 88% of all adults. Multiple-car ownership is now common in larger households.

[2] Source: U.S. Department of Commerce.

Chart A

Percent of U.S. Households With One or More Automobiles Available



Source: U.S. Department of Commerce, Bureau of the Census

Table 1

Usual Transportation When Shopping

	Base: =100%	By Car
Total	2,705	96%
By Sex:		
Male	1,086	96%
Female	1,612	95
By Age:		
18-24 years	290	94%
25-34 years	686	96
35-44 years	561	98
45-54 years	420	98
55-64 years	376	96
65 years & older	359	91
By Education:		
Some high school or less	427	94%
High school graduate	1,023	97
Some college	596	96
College graduate	637	94
By Household Income:		
$30,000 & over	730	98%
$20,000-$29,999	674	96
$10,000-$19,999	741	94
Under $10,000	445	92

Base: Total completing questionnaire=100%

C) The explosive growth of shopping centers

Traffic congestion and parking problems make the typical downtown shopping district inconvenient for those who like to shop by car. However, this presents no problem for the motorized American shopper, because suburban sprawl has been paralleled by retailer sprawl. Over two decades the number of shopping centers in the United States showed a fivefold increase, from 4,500 in 1960 to 22,050 in 1980.[1] For every county in the nation, we now have an average of seven shopping centers.

D) The decline of the traditional nuclear family

Since the general marketing of oral contraceptives began in 1961, birth rates have plummeted. In spite of some small recent upturns, it is unlikely that the overall birth rate will reach its pre-pill level in the future.

At the same time, divorce rates have skyrocketed, and today's young adults tend to remain single longer. The resulting decline in the proportion of households comprised of a working male, a full-time housewife and one or more young children has brought about a radical change in the mix of consumers' merchandise needs. The fairly homogeneous and predictable mass market of the fifties and sixties has been supplanted by an assortment of market segments with rapidly shifting, hard-to-define needs.

E) Drastic and widespread changes in family income patterns

Economists sometimes disagree on the nature of economic trends and their effect on American families. At least one analysis suggests that median family income, as measured in 1980 dollars, peaked in 1973, just before the first OPEC oil embargo.[2] On the other hand, the increase in the number of households with two wage earners has meant greater prosperity for some Americans.

Recent retailing experience indicates that shoppers with median or lower incomes now do more price shopping than ever before, whereas higher-income shoppers may be willing to pay a higher price so long as they are assured of getting value or durability. The net effect of these opposing trends favors high-end and low-end pricing over pricing aimed at a single undifferentiated "middle class" shopper.[1]

---

[1] Source: International Council of Shopping Centers, 1981.

[2] "Americans Are Running Faster To Stay In Place," American Demographics, June 1982.

F) More competition from the service industries

Services now claim a larger share of total consumer expenditures. According to the Department of Commerce, the share of total consumption expenditures going to services has risen from 39% in 1950 to 47% in 1981.[2]

The kinds of services consumers buy range from dinner in a restaurant, to packaged vacations, to health club memberships. Regardless of which mix of services they buy, each dollar spent in this way leaves less disposable income for purchases of durable and non-durable goods.

The six factors outlined above represent a few of the many developments that affect the shopping and buying behavior of American consumers. No one of these can be viewed in isolation or placed in a simple cause-and-effect framework, because they are all tied together in complex and elusive ways.

Do today's households own more cars because working women need them for transportation, or does the prior availability of so many automobiles make it possible for more and more women to take outside employment? In fact, it is unreasonable to frame this as an either/or question, because both sequences can undoubtedly be observed in individual households.

---

[1] For example, see remarks of Larry Light of Ted Bates Advertising in "Selling News," Newspaper Advertising Bureau, January 1983.

[2] "Survey of Current Business," U.S. Department of Commerce/Bureau of Economic Analysis, July 1982.

In the same vein, the shopping center boom of the sixties and seventies is obviously tied to the widespread use of cars for shopping, just as the increase in the number of working women is tied to the decline of the nuclear family.

These and many other current influences affect the shopping and buying behavior of American consumers. Their impact on retail business may not be immediately apparent, but ultimately these influences affect every facet of retailing--store location, inventory, pricing policy and advertising.

II. THE THIN MARKET: HOW MANY BUY AND WHO ARE THEY?

Dimensions of the Retail Economy

In the second half of 1981, the United States saw the beginning of its most serious recession since World War II. Nevertheless, the U.S. Department of Commerce estimates that in that year Americans spent nearly $1.5 trillion for goods and services, excluding housing. More than $962 billion was spent on durable and non-durable goods. Bringing these astronomical sums down to the level of a typical household, $157 was spent on jewelry and watches; $240 on furniture; and $761 on women's and children's clothing (see Appendix Table 1 for details).

These national and household estimates of expenditures may be impressive, but they also imply that, over a twelve-month period, purchases of certain kinds of merchandise are made by a limited number of households. If an average household spends only $240 on furniture, one might ask how much furniture could be bought for that sum at today's prices. On the other hand, in 1981 an average household spent a total of $11,648, or nearly half of its disposable income, on durable and non-durable goods (Appendix Table 2).

The "average" household is admittedly an artifical concept. If it were possible to allocate national totals for expenditures among different kinds of households, by stage in the life cycle, number of people in the household and other relevant variables, the figures would have much more meaning. Nevertheless, the overall average does provide at least a rough benchmark.

The national dollar estimates indicate that the most frequently purchased category of general merchandise[1] is "women's and children's apparel." Data from the National Purchase Diary (Appendix Table 3) also suggest that this is so: In an average month, 40% of their panel of households report purchasing some item of women's apparel, as compared with 24% buying men's clothing. Monthly apparel purchases show some seasonal variation; the present survey of shopping and buying was conducted during a fairly typical period (April and May).

---

[1] In this research "general merchandise" excludes food and package goods items like drugs and toiletries.

Hefty Sales From a Thin Market

In any given week, the huge amounts of money Americans spend on general merchandise come from a small percentage of the population. The present research asked a national telephone sample of 4,005 adult household heads about their shopping and buying over the past seven days, as well as their shopping and buying plans for the coming week. Exactly one week after the initial interview, 3,108 of the same respondents (77.6%) were asked the same questions on shopping and buying. The Week II interview also checked on the outcome of any shopping plans mentioned in Week I.

Table 2 details the average incidence of shopping, buying and planning for Weeks I and II. Looking at the first three major classifications covering apparel, it is evident that the survey results generally agree with the National Purchase Diary figures mentioned above. Women's wear accounts for more mentions than any other major category of general merchandise; over a seven-day period 14% of adult household heads buy some item of women's wear. However, no more than four out of 100 buy any individual classification of women's wear, like shoes and slippers.

Table 2

Percent of Adults Shopping For, Buying and Planning to Buy General Merchandise Items (Average Week)

	Shopped For	Bought	Plan to Buy
Any women's wear (net)	15.8%	14.0%	4.2%
Dresses	2.8	2.1	0.8
Pantyhose, nylons[†]	1.1	1.1	1.1
Coats and suits	1.3	1.0	0.3
Shoes, slippers	5.0	4.0	1.5
Bras, lingerie, nightwear	1.5	1.4	0.3
Tops, blouses, sweaters	4.1	3.8	0.6
Slacks, jeans, shorts	3.0	2.8	0.5
Accessories	1.0	0.8	0.1
All other	3.4	2.7	1.2
Any men's wear (net)	6.9%	6.4%	2.1%
Pants, slacks, jeans	2.3	2.1	0.4
Shirts	2.1	2.0	0.5
Coats, suits, jackets	0.9	0.8	0.2
Shoes, boots, sneakers	1.4	1.3	0.6
All other	2.6	2.4	0.9
Children's and infants' wear	4.6%	4.4%	1.2%
Girls' wear	1.7	1.7	0.3
Boys' wear	1.6	1.6	0.3
Children's shoes	1.0	0.9	0.2
Infants' clothing and supplies	1.4	1.3	0.6
Jewelry	1.8%	1.4%	0.4%
Stationery (net)	5.3%	4.9%	3.4%
Cards	2.0	1.9	0.2
Gift items	2.4	2.1	3.0
All other	1.3	1.2	0.3
Books, records, tapes (net)	2.8%	2.6%	0.4%
Books, magazines	1.6	1.5	0.3
Records, tapes, videotapes	1.4	1.2	0.2
Hobbies, games (net)	3.1%	2.9%	0.7%
Cameras, equipment	0.9	0.8	0.3
Toys, dolls	1.5	1.4	0.2
All other	0.9	0.9	0.3

[†] Percentage for pantyhose may be understated because respondents were asked to exclude "groceries." (Supermarkets account for a large share of pantyhose sales.)

Table 2 (continued)

Percent of Adults Shopping For, Buying and Planning to Buy General Merchandise Items (Average Week)

	Shopped For	Bought	Plan to Buy
Luggage and travel items	0.4%	0.3%	0.2%
Sporting goods	2.7	2.3	0.9
Pets, pet supplies	0.7	0.7	0.1
Small appliances	1.7	1.4	0.5
Major appliances	1.0	0.7	0.4
TV, stereo equipment	1.4	0.8	0.5
Furniture, furnishings (net)	4.9%	3.9%	2.0%
Carpets, rugs	0.9	0.7	0.4
Curtains, draperies, blinds, shades	1.0	0.9	0.7
Decorative accessories	1.0	1.0	0.2
All other furniture	2.5	1.8	0.9
Outdoor furniture	0.7%	0.5%	0.3%
Garden supplies (net)[‡]	8.5%	7.9%	3.0%
Seeds, plants, shrubs	5.2	5.0	1.9
Garden tools	1.6	1.2	0.5
Other garden supplies	2.7	2.6	1.1
Household textiles (net)	3.8%	3.4%	1.0%
Bedding and linens	1.5	1.3	0.4
Yard goods and trim	1.9	1.8	0.5
All other	0.8	0.7	0.2
Household wares and supplies (net)	3.1%	2.8%	0.7%
China, flatware and accessories	1.0	0.9	0.1
Kitchenwares	0.8	0.7	0.2
All other	1.4	1.3	0.4
Hardware and tools (net)	2.8%	2.6%	0.8%
Tools and accessories	1.1	1.0	0.3
Other hardware	1.8	1.7	0.4
Building supplies, home improvement items (net)	4.2%	3.8%	2.4%
Paints and brushes	1.7	1.6	0.9
Lumber and materials	1.6	1.4	1.0
All other	1.4	1.2	0.8

[‡] Figures for "garden supplies" may be affected by seasonal factors. Telephone interviewing was conducted between April 7 and May 22, 1982.

Table 2 (continued)

Percent of Adults Shopping For, Buying and Planning to Buy General Merchandise Items (Average Week)

	Shopped For	Bought	Plan to Buy
Motor Vehicles[†]	1.7%	0.9%	0.5%
Automotive supplies (net)	4.7%	4.2%	1.2%
Tires	0.9	0.7	0.4
Parts	3.1	2.9	0.6
All other	1.1	1.0	0.3
Personal items	0.8%	0.6%	0.1%
All other items not classified elsewhere	1.0%	1.0%	0.4%

Base: Total Telephone interviews=100%

[†] About 75% of motor vehicle mentions refer to passenger cars. 1981-82 was a poor year for automobile sales, but the survey was conducted during a period of heavy "rebate" promotions.

Table 2 reveals two general patterns of shopping and buying that apply to almost every listed classification of merchandise:

1. Once today's American shoppers go out looking for some item, they usually wind up buying it somewhere. For individual apparel classifications the reported ratio of buying to shopping is about 90%.
2. America's retail marketplace is highly volatile. In a given week the percentage shopping for or buying is quite small, but the percentage planning to buy within the coming week is even smaller. An interesting exception to this rule is "gifts." Later in the report, details on the relationship between Week I plans and Week II shopping and buying will shed more light on rapid fluctuations in the market.

"Male" and "Female" Merchandise

General merchandise retailers have long known that women are the principal customers for most kinds of merchandise. In fact, one unusual aspect of this research is the sampling of both male and female heads of household.[1] (In the 1965 survey by Opinion Research Corporation using the same basic methodology and questions, only women were interviewed.)

The present research confirms traditional retail wisdom on this score but also provides some national benchmark measures on the male/female customer ratios for particular kinds of items (Table 3). Men represent about 75% of all customers for four major classifications: men's wear; sporting goods; hardware and tools; and automotive supplies. About six out of ten customers for building supplies and home improvement items are men. The male/female customer ratio is about even for: major appliances, TV and stereo; books, records and tapes; and garden supplies. In part this reflects the fact that many major purchases are joint male-female decisions, but this issue was not investigated in the present survey.

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[1] See "National Survey of Shopping Habits," a methodological report on this survey prepared by Response Analysis, January 1983.

Table 3

Proportion of Purchases Made By Men and Women
(Major Merchandise Categories)

	Total Items =100%	Males	Females
Distribution of respondents	-	43%	57%
Women's wear	(1,645)	6%	94%
Men's wear	(717)	76	24
Children's and infants' wear	(601)	18	82
Other apparel	(172)	21	82
Jewelry	(115)	39	61
Books, records, tapes	(227)	49	51
Stationery, gift items	(433)	29	71
Toys, games, hobby items	(251)	35	65
Sporting goods	(217)	76	24
Furniture, furnishings	(355)	30	70
Major appliances, TV and stereo	(130)	53	47
Small appliances	(119)	37	61
Household textiles, sewing items	(336)	10	90
Household supplies	(245)	24	76
Hardware, tools	(241)	75	25
Building supplies, home improvement items	(370)	63	37
Automotive supplies	(384)	75	25
Garden supplies	(764)	46	54

Although this research was not a study of "influence," it indicates that most men buy their own apparel. Three out of four men's wear purchases (76%) are made by men.

Purchases of women's wear are even more one-sided; men account for only 6% of all buyers. Furthermore, this 6% is probably a high figure, because Mothers' Day fell within the interviewing period.

Nevertheless, for both women's wear and men's wear, the level of shopping, buying and planning is low even within the relavent sex. Over a seven-day period, only seven out of 100 women report buying any kind of footwear; only five out of 100 buy slacks, shorts or jeans; only three out of 100 buy lingerie or nightwear (Table 4). The men's wear market is even thinner. Only four men out of 100 buy pants or jeans; only three out of 100 buy shirts; and only one out of 100 buys socks, underwear or pajamas during an average week.

Table 4

Percent Shopping For, Buying and Planning To Buy Apparel Items (Average Week, by Sex)

	Shopped For	Bought	Plan to Buy
Women's Wear Items (by Women)			
Dresses	4.6%	3.4%	2.9%
Coats or suits	1.3	1.1	0.7
Shoes, slippers, etc.	8.6	7.0	4.8
Lingerie, nightwear	2.9	2.7	1.0
Blouses, sweaters, skirts	7.7	7.0	2.1
Slacks, shorts, jeans	5.6	5.3	1.8
Accessories	1.8	1.5	0.5
Men's Wear Items (by Men)			
Pants, jeans	4.4%	4.2%	1.5%
Shirts	3.6	3.3	1.5
Shoes, boots, etc.	3.0	2.7	2.5
Suits, jackets, coats	2.0	1.8	2.3
Socks, underwear, pajamas	1.2	1.2	0.5
Belts, hats, etc.	1.2	1.0	0.3
Sports attire (jogging suit, etc.)	0.8	0.7	0.4

How Women's Apparel Purchases Have Changed

The similar approach used in the 1965 and 1982 research makes it possible to show how women's apparel purchases have changed over the past seventeen years. The most striking difference between these two sets of data is that the female shopper of 1982 is much more likely to buy clothes for herself and less likely to buy clothes for children (Table 5).

Table 5

Distribution of Apparel Items Purchased by Women
(1965-1982)

	Year	
	1982	1965
Total apparel purchases	100%	100%
Women's wear items	66	44
Men's wear items	7	9
Girls' wear items	10	20
Boys' wear items	8	18
Infants' and other items	9	9
Base: Number of items bought=100%	(2,344)	(5,824)

This change in women's apparel buying can be attributed mostly to the change in the work status of women. Other research[1] shows that outside employment tends to increase apparel shopping and buying among women, because working women feel that they need more clothes than full-time housewives do.

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[1] "Women, Work and Markets of the 80's," Newspaper Advertising Bureau, 1979.

The Age Mix for Different Kinds of Merchandise

Each of three age groups accounts for a third of the total sample: 18 to 34 years (34%), 35 to 54 years (33%), and 55 years or older (33%). However, the age distribution of those buying particular kinds of merchandise is very different from the overall distribution (Table 6).

Table 6

Proportion of Purchases Made By Age Groups
(Major merchandise categories)

	Total Items =100%	18-34 Years	35-54 Years	55 Yrs. & Older
Distribution of Respondents	-	34%	33%	33%
Women's wear	1,625	37%	39%	24%
Men's wear	714	42	36	22
Children's and infants' wear	590	50	40	10
Other apparel	170	51	39	10
Jewelry	115	38	45	17
Books, records, tapes	225	51	39	11
Stationery, gift items	426	40	34	26
Toys, games, hobby items	248	48	37	15
Sporting goods	216	48	39	13
Furniture, furnishings	353	33	42	25
Major appliances, TV and stereo	130	38	36	25
Small appliances	119	34	34	32
Household textiles, sewing items	328	33	35	32
Household supplies	241	38	31	31
Hardware, tools	237	37	41	22
Building supplies, home improvement items	371	31	38	31
Automotive supplies	379	44	38	18
Garden supplies	759	32	38	30

In most categories, adults under 35 account for a share of purchases larger than their proportion of the total population. This is especially true for items related to recreation and leisure time (sporting goods, records, toys and games) and for children's and infants' clothing. However, younger adults are somewhat underrepresented in purchases of home-centered items.

The affluent middle-age adults from 35 to 54 years old are better than average purchasers of most kinds of merchandise, especially jewelry and home-related items like furniture, building supplies and garden supplies.

There are only a few categories in which adults 55 or older account for a share approaching their proportion of the population. These tend to be home-related items like small appliances and sewing items. The lower level of buying in this age group reflects smaller household size and reduced incomes among those who are retired. Older adults also may perceive themselves as having less "need" for many kinds of merchandise.

There Is Room for Both High-end and Low-end Price Lines

Among those reporting household incomes, those in the top classification ($30,000 and over) account for a disproportionate share of the purchases in most categories. This is especially evident in categories like "books, records and tapes," "men's wear" and "jewelry." The top income group also accounted for a high proportion of all major appliance, TV and stereo purchases (Table 7).

Table 7

Proportion of Purchases Made by Household Income Groups
(Major merchandise categories)

	Base Items =100%*	$30,000 & Over	$20,000-$29,999	$10,000-$19,999	Under $10,000
Distribution of Respondents	-	27%	25%	29%	19%
Women's wear	1,345	29%	28%	28%	15%
Men's wear	633	41	24	25	10
Children's and infants' wear	524	36	25	27	12
Other apparel	138	34	23	29	14
Jewelry	91	40	29	21	10
Books, records, tapes	188	46	26	21	7
Stationery, gift items	359	33	28	25	14
Toys, games, hobby items	224	38	20	30	12
Sporting goods	199	37	33	24	6
Furniture, furnishings	291	34	28	25	13
Major appliances, TV and stereo	115	44	19	22	15
Small appliances	104	31	23	33	13
Household textiles, sewing items	278	32	31	25	12
Household supplies	214	36	25	23	16
Hardware, tools	200	35	30	25	10
Building supplies, home improvement items	330	38	30	23	9
Automotive supplies	333	37	26	25	12
Garden supplies	669	37	24	23	16

*Bases shown are smaller than in other tables because of respondents refusing question on household income.

However, the 73% of households with incomes under $30,000 account for the higher share of items bought in all categories. They buy 71% of all women's wear; 54% of all books records and tapes; 63% of all sporting goods; and 69% of all small appliances.

Who are the Frequent Shoppers and Buyers?

Among the respondents interviewed twice, the 33% who report shopping for something both weeks and the 27% who report buying something both weeks might be called frequent shoppers and buyers:

	Shopping	Buying
Both weeks	33%	27%
One week only	40	43
Neither week	27	30

The incidence of frequent shopping and buying varies with sex, age and status. This can be illustrated by looking at the frequent buyers; frequent shoppers show the same basic patterns.

Women (30%) are more likely than men (24%) to be frequent buyers, and in today's economy it is employed women who make the difference (Table 8). One third (34%) of the employed women are frequent buyers, as compared with only 26% of those who are not employed.

The proportion of frequent buyers is above average (34%) for people under 45 years old, about average (27%) for those who are 45 to 64, and far below average (12%) for those who are 65 or older. Frequent buying varies sharply with household income, from 37% of those with incomes of $30,000 and over, to 19% of those with incomes under $10,000.

Table 8

General Merchandise Buying Over Two-Week Period

	Bought Both Weeks	Bought One Week	Did Not Buy
Total Adults	27%	43%	30%
By Sex:			
Male	24%	43%	33%
Female	30	42	28
Women, by Employment:			
Employed	34%	48%	18%
Not employed	26	38	36
By Age:			
18-24 years	34%	47%	19%
25-34 years	34	47	19
35-44 years	35	44	21
45-54 years	29	42	29
55-64 years	24	43	33
65 years or older	12	33	55
By Education:			
Some high school or less	17%	38%	45%
High school graduate	27	43	30
Some college	31	45	24
College graduate	34	44	22
By Household Income:			
$30,00 and over	37%	44%	19%
$20,000-$29,999	33	44	23
$10,000-$19,999	23	45	32
Under $10,000	19	35	46

Base: Respondents interviewed twice by phone=100%
(See Appendix for bases.)

III. PLANNED AND UNPLANNED BUYING: THE CHANGING CUSTOMER MIX

As a proportion of the adult population the small percentage of adults shopping for and buying a particular item is likely to show little change from week to week within a given season. However, the individuals who make up this small percentage are in constant flux. Some people move into the market very rapidly, while others drop out just as fast. This chapter explores some of the factors in the retail market's volatility.

What Happens to Those Week I Buying Plans in Week II?

As mentioned in the preceding chapter, the percentage of people who plan their shopping and buying as much as a week in advance is quite small. This makes it difficult to track the outcome of plans to buy particular kinds of merchandise, even with a large sample. However, there are enough planners among the 3,122 respondents interviewed in Week II to develop figures for most major categories of merchandise.

Overall, about four out of ten Week I planners got around to shopping before they were re-interviewed seven days later, and 35% actually bought what they planned to buy (Table 9). Most of the remainder still plan to buy, but 17% have dropped their plans. The results of this research suggest that big-ticket purchases like furniture and major appliances are most likely to be postponed.

Table 9

Week II Outcome of Week I Buying Plans

	Base: Plan To Buy=100%	Shopped	Bought	Still Plan	Dropped Plans
Any women's wear	223	40%	31%	48%	18%
Shoes, slippers	61	44	31	47	19
Any men's wear	112	34	31	55	18
Children's and infants' wear	55	40	40	34	33
Stationery, gift items	103	46	41	41	24
Major appliances, TV and stereo	36	30	15	75	7
Furniture, furnishings	97	28	25	67	10
Household textiles, sewing items	51	50	42	41	11
Housewares and supplies	76	40	34	43	17
Garden supplies	147	51	45	41	14
Building supplies, home improvement	100	45	38	45	15
Automotive supplies	46	55	52	33	17
Average: all categories	-	42%	35%	48%	17%

Most of This Week's Purchases Weren't Even Planned Last Week

If so few consumers make buying plans for the coming week, and if the majority of these planners fail to follow through within that time, it is obvious that most purchases are planned no more than a few days in advance. In this research, 85% of the purchases made in week II were not mentioned as planned purchases in Week I interviews (Table 10). The ratio of "unplanned" purchases to total purchases shows relatively small differences from one merchandise category to another. The lowest ratio found is 73%, for building supplies and home improvement items; the highest is 95%, for housewares and supplies.

Table 10

Percent of Week II Purchases Not Planned in Week I

	Number of Purchases	Percent Unplanned
Any women's wear	499	86%
Dresses	43	88%
Shoes, slippers	89	79
Blouses, tops, sweaters	98	91
Slacks, jeans, shorts	72	88
Bras, lingerie, sleepwear	50	88
Any men's wear	194	82%
Any children's, infants' wear	145	85
Any stationery, gift items	178	76
Major appliances, TV, stereo	40	88%
Furniture, furnishings	112	79
Garden supplies	313	79
Household textiles, sewing items	144	85%
Housewares and supplies	104	95
Sporting goods	85	85
Jewelry	40	88%
Hobbies, games, toys	92	86
Hardware and tools	85	89
Building supplies, home improvement	140	73%
Books, records, tapes	66	88
Auto supplies	144	83
Average: all categories	-	85%

(Unweighted base for Week II respondents=3,122)

Even if planned shopping and buying is rare, it does not necessarily follow that all unplanned purchases represent "impulse" buying. In some cases, an unexpected eve[illegible] example, a broken appliance) creates the need. In other case[illegible]e may have an underlying readiness to buy that can be triggered by effective advertising, special price promotions or innovations in product features.

One possible reason for postponing or dropping buying plans may be that the planner has bought something else which wasn't planned on; most adults have limits on their disposable income. This kind of restraint on buying plans is less likely to affect charge customers than those who pay cash.

Unplanned Purchases From Another Angle

The preceding section shows that comparisons between the first and second telephone interviews make it possible to measure unplanned purchases indirectly. That is, we can use any individual's responses for this purpose, even though the individual may not be aware that we are doing so.

It is also possible to investigate unplanned buying directly. In the self-administered questionnaire respondents were explicitly asked whether they recalled making any unplanned purchases within the last month or so. Overall, 45% admit to one or more unplanned purchases (Table 11). From the more immediate though indirect evidence of the telephone interviews, this appears to be a gross understatement. The level of reported unplanned buying is highest among those with household incomes of $30,000 and over (51%) and lowest among those with incomes under $10,000 (37%).

Table 11

Percent Recalling Unplanned Purchases
(by Household Income)

	Total	$30,000 & over	$20,000-$29,999	$10,000-$19,999	Under $10,000
	45%	51%	47%	43%	37%
Base:	(2,705)	(675)	(619)	(671)	(373)

Total SAQs=100%

Question: Within the last month or so, have you bought anything you had not planned on buying more than a day or two beforehand?

Does Advertising Influence Unplanned Purchases?

In response to a direct question, about four out of ten among those reporting unplanned buying say that advertising brought the item purchased to their attention (Table 12). Men and women are equally likely to admit to this kind of influence, but a smaller percentage of younger than older adults say that they saw or heard advertising. One possible reason for the difference between age groups is that young people for whom shopping is a leisure-time activity may run across a buy that they can't resist.

Table 12

Advertising Exposure Before Last Unplanned Purchase
(by Sex and Age)

	Base	Saw or Heard Advertising
Total reporting unplanned purchase	1,239	41%
Males	454	42%
Females	784	41
18-24 years	162	34%
25-34 years	335	37
35-44 years	286	40
45-54 years	182	44
55-64 years	155	47
65 years or older	165	51

Total SAQ's=100%

Question: The last time you recall making an unplanned purchase, did you happen to see or hear any advertising that brought this item to your attention?

What Kind of Advertising Generates Unplanned Buying?

Those who saw or heard advertising prior to their last unplanned purchase were asked to indicate the source of this advertising on a checklist of six media. Six out of ten (60%) selected the newspaper, whereas the total percentage for the other five media combined was 46% (Table 13).[1]

Table 13

Source of Advertising That Brought Unplanned Purchase to Buyer's Attention

	Percent †
Newspaper	60%
Television	17
Direct mail	15
Magazine	6
Radio	5
Something left at door	3
No answer	1
Base: Total who saw or heard advertising=100%	(509)

Question: Where did you see or hear this advertising?

†Total exceeds 100% because of multiple mentions.

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[1] In a 1981 study, 63% of the women interviewed said that newspaper advertising was the most helpful of four listed media when deciding where to shop for personal clothing. (See "Women and Fashion," Newspaper Advertising Bureau, 1981.)

Implications of the Changing Customer Mix

As this chapter has shown, consumer buying plans are very fluid. The odds are about six to four that any individual who plans to buy a particular kind of merchandise won't get around to shopping for it within the next seven days, and nearly half of the non-buyers will drop their plans. On the other hand, many more people who don't have any buying plans for the coming week will wind up buying something.

Because of the rapidly changing customer mix, it is virtually impossible to target the small percentage who will buy a particular item in the coming week. Frequent item and price advertising that reaches a large percentage of the total population is needed to maximize retail sales.

Respondents who recalled seeing or hearing advertising that stimulated their last unplanned purchase were asked about the source of this advertising. In response to this self-administered question, 60% checked "in a newspaper," as compared with 17% checking the second-ranking "on television."

IV. SHOPPERS ON WHEELS

As shown in Chapter I, 96% of the respondents completing the questionnaire say that they usually go shopping by car. This statistic is central to understanding today's shopper.

The heavy use of automobiles by shoppers entails both hazards and opportunities for shopping areas and retailers. On the one hand, loyalty to any one shopping area or store has largely evaporated because of the car. On the other hand, the mobility of today's shopper enables retailers to attract buyers from a much larger area. The extended drawing area is a strategic advantage, because this week's prospects for a particular kind of merchandise are scattered throughout the market.

How Many Shopping Centers Can They Reach?

The extreme mobility of shoppers and the effect this mobility has on store loyalty can be illustrated by responses to two questions on how many shopping centers or malls are convenient and how many have been visited within the past three months. Of those completing the questionnaire, 56% report that three or more shopping centers are convenient to their homes, and 44% say that they have visited three or more within the past three months (Table 14).

Table 14

Shopping Centers and Malls: Accessibility and Visits

Number:	Convenient To Home	Visited Past 3 Mos.
None	7%	8%
One	12	23
Two	24	34
Three	28	21
Four or more	28	13
No answer	1	1

Base: Total completing questionnaire=100% (2,705)

Questions: How many shopping centers or malls can you conveniently reach? Within the past three months or so, how many of these shopping centers or malls have you personally shopped in?

The Car Simplifies Multiple-Purpose Shopping

The focus of this survey was on general merchandise, but the self-administered questionnaire also asked respondents whether their last major food-shopping trip involved shopping in some other kind of store. About four out of ten (42%) confirm that on their last major food shopping trip they also shopped for general merchandise (Table 15). In households with two or more persons, 33% report that two or more household members go along on major food shopping trips.[1]

Table 15

Other Shopping on Last Major Food Shopping Trip

	Total	Male	Female
Shopped in other kind of store	42%	41%	43%
Shopped in food stores only	57	58	56
No answer	1	1	1
Base: Total completing questionnaire=100%	(2,705)	(1,086)	(1,612)

Question: The last time you went on a major food shopping trip, did you also shop in some other kind of store for something other than food, groceries, drugs or toiletries?

What Kinds of Shopping Areas Do People Patronize?

Respondents completing the questionnaire were asked to estimate how much of their shopping they do in three types of shopping areas: downtown shopping districts, neighborhood shopping streets or districts, and shopping centers or malls. Responses to these questions cannot be taken as precise measures but they provide at least a rough idea of the relative popularity of basic kinds of shopping areas. In all, 42% of those completing the questionnaire report that they do more than half of their shopping in shopping centers or malls (Table 16).

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[1] Not shown in table.

Table 16

Percent of Shopping in Listed Types of Shopping Districts

	Downtown	Neighborhood	Shopping Centers, Malls
None	14%	6%	3%
Less than 10%	24	21	13
10% to 25%	14	19	17
26% to 50%	14	17	24
More than 50%	16	28	42
No such shopping district near home	17	8	NA[1]
No answer	1	1	1

Column Base: Total completing questionnaire=100% (2,705)

Questions: About what percent of your shopping do you do in: the largest downtown shopping district convenient to your home or place of work; neighborhood shopping streets or districts in town; shopping centers or malls?

A Good Buy Can Draw Buyers From Miles Away

In the self-administered questionnaire, respondents who reported individual purchases of $300 or more within the past six months[2] were asked how far they traveled to make their last major purchase. In response, 35% said that they had gone ten miles or more (Table 17). In contrast, only 4% said that they had ordered the merchandise by mail or phone.

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[1] Percentages based on those shopping in centers or malls only.

[2] For kinds of major purchases reported, see Appendix Table 4.

Table 17

Distance Traveled for Last Purchase of $300 or more

	Total Buyers	Males	Females
Less than 5 miles	32%	34%	29%
Between 5 & 10 miles	28	26	29
10 miles or more	35	35	36
Ordered by mail or phone	4	4	5
No answer	1	1	1
Base: Total making major purchase=100%	(1,449)	(618)	(829)

Question: The last time you made a major purchase of $300 or more, about how far did you go to make it?

As a follow-up, these purchasers of big-ticket items were asked why they chose that particular store or dealer. Responses showed that price was the major influence for most of these buyers: 34% checked "they advertised a good price" and 33% said that they "shopped several stores" to get the best price (Table 18).

Table 18

Reasons for Buying Major Purchase From That Store or Dealer

	Total	Males	Females
They advertised a good price on what I needed	34%	33%	34%
Shopped several stores, and they had the best price	33	31	35
Usually go to that store for that kind of purchase	31	33	29
Friend or relative recommended them	18	17	19
They had the model/brand/ quality/selection I want	6	4	7
They advertised a new product, model or style	3	3	3
They were conveniently located	1	1	1
All other reasons	11	11	11
Total making major purchase=100%	(1,449)	(618)	(829)

Question: How did you happen to buy from that particular store or dealer? (Circle as many as apply.)

In comparison, a convenient location was a very minor factor for these motorized shoppers. Only 1% said that they chose the store where they made their last major purchase because of its convenient location. These findings strongly suggest that for any dealer selling big-ticket merchandise, a sound advertising strategy covering the entire market is far more important than is store location.

All Kinds of Buyers Patronize All Kinds of Shopping Areas

As shown in Chapter II (Table 8), 70% of the men and women interviewed by telephone reported making general merchandise purchases during the interviewing period. For each purchase, buyers were asked the name of the store and the type of location in which the item was bought.

Responses to the question on location show that all kinds of shoppers buy in all kinds of shopping areas (Table 19). The most frequently named location is shopping centers or malls, mentioned by 46% of the buyers.[1] Buyers in all major demographic segments name shopping centers or malls more often than any other type of location. Centers and malls are especially favored by employed women, young adults and high-income respondents.

References to other types of locations are split about evenly among "downtown" (31%), "neighborhood" (35%), and "free-standing store" (31%). The segments reporting the highest percentages of downtown purchases are older customers and buyers with lower incomes. Free-standing stores are most popular with men and high-income buyers.

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[1] The question wording attempted to exclude downtown shopping centers and malls by specifying "on the highway," but some buyers may have ignored this qualification.

Table 19

Types of Shopping Areas in Which Purchases Were Made
(by Demographics)

	Base: =100%	Down-town	Neighbor-hood	Shopping Center, Mall	Free Standing Store
Total buyers	(2,685)	31%	35%	46%	31%
By Sex:					
Male	(1,026)	33%	31%	40%	36%
Female	(1,653)	30	38	50	28
By Age:					
18-24 years	(324)	29%	36%	51%	27%
25-34 years	(744)	32	37	47	32
35-44 years	(602)	30	36	50	34
45-54 years	(602)	27	35	47	34
55-64 years	(388)	35	37	40	27
65 or older	(257)	35	25	37	26
By Education:					
Some high school or less	(387)	31%	27%	44%	28%
High school graduate	(1,000)	30	37	45	30
Some college	(607)	32	37	47	33
By Household Income:					
$30,000 & over	(707)	32%	37%	50%	37%
$20,000-$29,999	(611)	29	35	47	33
$10,000-$19,999	(610)	32	33	46	28
Under $10,000	(308)	38	31	42	25
Women, by Employment:					
Employed	(913)	30	38	52	27
Not employed	(724)	31	37	47	28

Base: Total making any purchase, Week I &/or II=100%

Question: Was this store downtown, or in a local neighborhood shopping district, or in a shopping center or mall on the highway?

Different Locations Have Different Mixes of Merchandise

All kinds of merchandise can be bought in all types of shopping locations, but the merchandise mix for the four major shopping locations varies significantly.

The dominant position of shopping centers and malls depends partly on the fact that this kind of location is especially popular for apparel purchases--the kind of merchandise consumers buy most often. Six out of ten shopping center purchases (60%) are clothing or jewelry (Table 20).

Table 20

Mix of Merchandise Categories Bought in Four Shopping Locations

	Downtown	Neighborhood	Shopping Center	Free Standing Store
Women's wear	25%	23%	30%	14%
Men's wear	9	11	13	7
Children's & infants' wear	7	9	12	7
Jewelry	2	2	2	1
Other apparel	2	3	3	2
Apparel subtotal	45%	48%	60%	31%
Stationery, gift items	7%	8%	6%	4%
Books, records, tapes	5	3	3	3
Hobbies, games, special interest items	3	4	3	4
Major appliances, TV, stereo	2	2	2	2
Small appliances	2	2	2	1
Furniture, furnishings	4	5	4	7
Household textiles, sewing items	5	6	5	5
Household supplies	4	3	3	4
Hardware and tools	4	4	2	6
Automotive supplies	6	5	3	12
Building supplies, home improvement items	6	4	3	12
Sporting goods	3	3	2	4
Pets, pet supplies	1	1	1	1
All other items	3	2	1	4
Base: Total items* bought=100%	(1,334)	(1,606)	(2,311)	(1,129)

*Garden supplies, outdoor furniture and motor vehicles have been excluded. The April-May timing of the survey may lead to an overstatement of these categories.

The merchandise mix of free-standing stores shows the sharpest contrast with the shopping center profile. Only 31% of the items bought in free-standing stores are apparel. On the other hand, automotive supplies, building supplies and home improvement materials are much more important in the free-standing store mix.

The merchandise mix for downtown and neighborhood shopping districts lies between these two extremes. Apparel represents 45% of the items purchased downtown and 48% of those purchased in neighborhood shopping areas, and the profile of items bought in these two types of shopping locations is generally similar.

Where Do Customers Buy?

The percentages shown in Table 20 can also be based on the total items bought, rather than types of locations. This horizontal percentaging answers the question, "Of all items bought, what percentage was bought downtown, in shopping centers, and so forth?"

Table 21 shows the results of horizontal percentaging. Once again, shopping centers and malls account for a larger share of purchases than any other type of location. About one third (32%) of all general merchandise purchases are bought in shopping centers or malls, but 43% of all women's wear was bought in this type of location.

The heavy use of free standing stores by male buyers is partly explained by the fact that this kind of location accounts for 37% of all purchases of building supplies and home improvement items and 36% of all purchases of automotive supplies.

Downtown and neighborhood shopping districts do not enjoy an overwhelming lead in any major merchandise category. However, three out of ten purchases of stationery and gift items (31%) are made in neighborhood shopping areas, and 27% of all purchases of books, records and tapes are made downtown.

Table 21

Types of Shopping Locations Where Items Were Bought

	Base: =100%	Downtown	Neighbor-hood	Shopping Center, Mall	Free Standing Store
Total items[†]	7,653	20%	23%	32%	19%
Women's wear	1,646	20	23	43	9
Men's wear	717	18	25	42	11
Children's & infants' wear	601	15	25	45	13
Jewelry	115	20	24	36	12
Other apparel	172	16	24	43	11
Stationery, gift items	433	23	31	30	11
Books, records	227	27	23	29	15
Hobbies, games, special interest	251	16	26	32	19
Major applicances, TV, stereo	130	23	21	34	15
Small appliances	119	20	31	35	9
Furniture, furnishings	355	15	24	29	22
Household textiles, sewing items	336	19	27	33	16
Household supplies	245	20	21	30	20
Hardware, tools	241	21	23	20	28
Automotive supplies	384	22	20	17	36
Building supplies, home improvement	370	22	20	17	37
Sporting goods	217	19	21	26	23

Base: Total items bought, Weeks I and II=100%

[†] Total figure exceeds sum of individual categories because table excludes bases too small for percentaging. Rows do not total 100% because mail and phone orders and "no answers" have been excluded.

V. COMPETITION AMONG RETAILERS

The highly competitive character of today's marketplace has been brought about by both management actions and outside developments beyond any retailer's control.

Today's retailers must compete not only with other conventional stores but also with mail order companies, factory outlets, service companies, credit card organizations, flea markets[1] and street vendors, among others. Many of the manufacturers who supply goods to stores also represent competition for consumer attention.

Exploration of policies and strategies needed to compete effectively in today's market lies beyond the scope of this research, but this chapter describes some of the elements in the competitive picture.

All Kinds of Shoppers Shop in All Kinds of Stores

If consumers show little or no loyalty to any one type of shopping location, they are even more fickle when it comes to the kinds of stores they patronize. In part, the existence of so many store types is tied to the fact that certain merchandise is carried only by specialized outlets, but frequently purchased items can be bought in many kinds of stores. For example, anyone looking for jogging, tennis or leisure shoes can find them in department stores, discount stores, national chains, shoe stores, sporting goods outlets, mail order catalogs, and even some "drugstores."

On the average, shoppers interviewed by telephone report visiting 2.1 types of retail outlets during the two-week interviewing period.[2] This figure is deceptively small, because the scope of the research made it infeasible to detail the number of stores. For example, a woman shopping for a blouse in three different outlets, all of which are department stores, would be listed as shopping in only one type of store for this item.

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[1] See Appendix Table 5 for percentage of consumers who have shopped in flea markets.

[2] Shoppers and buyers were actually asked to give interviewers only the names of the stores they shopped in. The head office of Response Analysis then classified these names by store type, as described in the introduction.

The various types of stores shopped in, classified by sex (Table 22) and by household income (Table 23), illustrate two major points which apply to every major demographic segment[1]:

1) Customers in every major demographic segment shop in many different kinds of stores, but
2) The extent to which particular kinds of stores are patronized shows differences from one segment to another. In general, this reflects the kinds of merchandise carried by these various types of stores.

Table 22 shows that discount stores, department stores and national chains attract more shoppers than any single type of specialty store. However, evidence presented later in this chapter shows that specialty stores capture the largest share of shopping for many particular kinds of merchandise.

Table 22 also shows that women are more likely than men to shop in department stores (32% versus 13%), whereas the two sexes are almost equally likely to shop in national chains (25% for men versus 27% for women). The figures for men are significantly higher only in those categories traditionally identified with "male interest" items (men's specialty stores, auto supply stores, building and hardware outlets).

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[1] The Appendix details types of stores shopped in by age (Table 6) and education (Table 7).

Table 22

Types of Stores Shopped In During a Two-week Period
(by Sex)

	Total Shoppers	Male Shoppers	Female Shoppers
Department store	24%	13%	32%
Discount store	33	28	37
National chain store	26	25	27
Men's specialty store	5	10	2
Women's specialty store	14	3	22
Miscellaneous apparel store	3	2	5
Shoe store	9	5	12
Miscellaneous specialty store	30	32	28
Building and hardware store	12	18	8
Nursery, plant store	9	9	10
Home furnishings, appliances	6	6	6
Auto supply store	6	11	3
Auto dealer	3	6	1
Variety store	3	1	4
Factory outlet, warehouse store	3	2	3
Drugstore*	5	4	5
Supermarket*	2	2	2
Mail and phone order (net)	3	3	3
All other	9	11	7
Don't know, not sure	5	5	5
No answer	16	17	15
Unweighted base: Total shoppers=100%	(2,824)	(1,095)	(1,722)

*Respondents were asked to exclude shopping for "groceries, drugs or toiletries." Therefore, percents shopping in drugstores and supermarkets refer to general merchandise shopping only.

Table 23 reflects the fact that upper-income customers do more shopping in general. Department stores tend to have an upscale profile, while discount stores are more popular with middle- and lower-income groups. However, it should be kept in mind that no major type of store attracts all of its customers from a narrowly defined segment.

Table 23

Types of Stores Shopped In During a Two-week Period

(by Household Income)

	$30,000 & Over	$20,000-$29,999	$10,000-$19,999	Under $10,000
Department store	28%	23%	22%	18%
Discount store	30	34	41	36
National chain store	28	26	28	21
Men's specialty store	8	5	4	4
Women's specialty store	16	14	13	12
Miscellaneous apparel store	4	3	3	3
Shoe store	9	9	10	10
Miscellaneous specialty store	36	32	27	24
Building and hardware	14	14	12	8
Nursery, plant store	12	9	8	10
Home furnishings, appliances	7	6	6	6
Auto supply store	7	5	8	7
Auto dealer	4	4	2	2
Variety store	2	3	3	6
Factory outlet, warehouse store	3	3	3	3
Drugstore*	5	5	5	5
Supermarket*	2	1	3	2
Mail and phone order (net)	4	3	3	2
All other	11	10	8	6
Don't know, not sure	7	4	4	5
No answer	20	14	16	14
Unweighted base: Total shoppers=100%	(736)	(641)	(644)	(327)

*Respondents were asked to exclude shopping for "groceries, drugs or toiletries." Therefore, percents shopping in drugstores and supermarkets refer to general merchandise shopping only.

The Merchandise Mix for Three Major Types of Stores

In a given demographic segment different levels of buying in different kinds of stores reflect the kinds of things people buy in these retail outlets. In this context, "merchandise mix" refers to the kinds of things people buy in the two-week interviewing period, rather than the items actually carried by the store.

A large percentage of both department stores and discount stores carry small appliances as well as women's wear. However, women's wear accounts for 37% of all items bought in department stores but only 17% of all items bought in discount stores (Table 24). Conversely, small appliances represent only 2% of the items bought in department stores, as compared with 4% of all items bought in discount stores.

Overall, apparel represents a far larger share of all department store purchases (73%) than of all discount store purchases (48%), with national chains falling between these two types of stores (63%). This finding may reflect the fact that a number of formerly "full-line" department stores concentrate more and more on apparel even though they are still described as department stores.

Table 24

Mix of Merchandise Categories Bought In Three Types of Stores†

	Department Store	Discount Store	National Chain
Women's wear‡	37%	17%	23%
Men's wear‡	12	7	15
Children's & infants' wear‡	10	12	12
Shoes, sneakers, slippers	8	8	8
Jewelry	2	1	1
Other apparel‡	4	3	4
Apparel subtotal	73%	48%	63%
Major appliances, TV, stereo	1%	2%	4%
Small appliances	2	4	2
Furniture, furnishings	3	4	6
Hardware, tools	*	2	4
Building supplies, home improvement items	*	3	4
Auto supplies	*	4	3
Household textiles, sewing items	6	8	5
Household supplies	4	7	1
Stationery, gift items	6	6	3
Books, records, tapes	*	2	1
Hobbies, games, special interest items	2	6	2
Sporting goods	1	1	1
Pets and pet supplies	1	1	*
Luggage, travel items	*	*	*
Miscellaneous	1	1	1
Base: Total purchases=100%	(857)	(1,319)	(793)

†Does not include cosmetics or fragrances because respondents were instructed to exclude purchases of "drugs and toiletries." "Garden supplies" and "outdoor furniture" have been excluded to minimize seasonal distortion of figures for other categories.

‡Excludes footwear.

*Less than 0.5%.

Apparel: The Importance of Specialty Stores

Because of their larger size and the variety of merchandise they carry, department stores, discount stores and national chains account for a large share of all purchases. However, when it comes to a particular kind of item, no one of these store types appear to attract as many buyers as the stores which specialize in that kind of merchandise.

Table 25 shows the types of stores from which shoes, men's wear and women's wear items were bought. In today's highly competitive retail environment, no single type of store accounts for the majority of purchases in any of these three categories. However, in all three of these apparel categories specialty stores account for a larger share of purchases than larger stores do. More than one fourth of all men's wear (27%) is bought in men's specialty stores; 34% of all women's wear items are bought in women's specialty stores; and 43% of all shoes (men's, women's and children's) are bought in shoe stores.[1]

Table 25

Purchases of Men's Wear, Women's Wear and Shoes
(by Type of Store)

	Men's Wear†	Women's Wear†	Shoes‡
Department store	17%	24%	13%
Discount store	15	17	19
National chain store	19	14	11
Men's specialty store	27	-	1
Women's specialty store	4	34	4
Other apparel specialty store	2	1	1
Shoe store	*	1	43
Other specialty store	3	2	2
Factory outlet/warehouse store	3	2	1
Mail & phone order (net)	1	*	*
All other	3	2	1
No answer, not sure	6	3	4
Base: Total items bought=100%	(612)	(1,323)	(540)

†Excludes all types of footwear.

‡Total for men's, women's and children's shoes.

*Less than 0.5%

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[1] It should be noted that all figures on purchases refer only to items and should not be equated with sales volume figures expressed in dollars.

Specialty Stores Dominate Some Merchandise Categories

Outside the apparel category, specialty stores are even more important for some types of merchandise. In the do-it-yourself field, hardware stores, building materials companies and home centers account for 50% of all hardware and tools bought, as well as 64% of all building supplies and home improvement items (Table 26).

Table 26

Proportion of Selected Product Categories Bought in Specialty Stores

	Base: =100%	Building Materials, Hardware Stores†	Nurseries, Plant Stores	Other Specialty Stores
Hardware, tools	241	50%	1%	12%
Building supplies, home improvement items	370	64	*	10
Garden supplies	764	11	44	4
Jewelry	115	NA	NA	43
Sporting goods	217	1	NA	43
Books, records, tapes	227	NA	NA	65

Base: All items bought, Weeks I & II=100%

†Includes home centers.

*Less than 0.5%.

Among those buying plants, seeds and garden supplies, 44% purchased these items from a nursery or plant store. The specialty store's share of items bought was especially high for books, records and tapes; 65% of all these items were purchased from specialty stores.

One reason why customers may favor specialty stores for certain kinds of purchases is that they may expect to find a larger selection of brands, models, types and prices in this kind of store. However, the expertise of the sales personnel may also be important, especially in those areas where consumers feel insecure.

Mail and Phone Orders

Figures on the types of stores shopped and bought in (Tables 21, 22 and 24) understate the extent to which customers order merchandise by mail and phone. This is because mail and phone orders are a method of buying as well as a source. In-home customers can buy from local department stores, national chains and specialty stores, as well as from retail firms that are exclusively mail order. Many newspaper ads for department stores explicitly state that the advertised goods may be ordered by mail or phone.

In the self-administered questionnaire, responses to a direct question on in-home buying indicate that over a seven-day period, 16% place mail orders and 10% place phone orders (Table 27).[1] Selling by mail and phone may offer certain advantages to retailers, but bypassing the in-store shopping trip may eliminate the chance to sell other merchandise to the same customer. Earlier research indicates that customers coming in to buy advertised items on sale end up spending an equal amount on unadvertised merchandise.[2]

Table 27

Percentage Ordering by Mail or Phone in Past Seven Days

	Total	Male	Female
Ordered by mail (net)	16%	14%	18%
Ordered by phone (net)	10	9	11
Base: Total completing questionnaire=100%	(2,705)	(1,086)	(1,612)

Question: Not counting food products, drugs or magazines, have you ordered anything by mail or by phone in the last seven days?

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[1] For kinds of items ordered by mail and phone, see Appendix Table 8.

[2] See "The Double Dividend," Newspaper Advertising Bureau, 1977.

Converting Shoppers to Buyers

In a given week, the great majority of those who go shopping for a particular item wind up buying it somewhere. Table 28 shows that for eighteen merchandise categories, the average proportion of shoppers who buy is 87%. In the apparel group, the ratio of buyers to shoppers is somewhat lower for women's dresses (77%) and shoes (84%) than for men's and children's clothing, perhaps because women are more demanding and style-conscious. The ratio also tends to be below the average for big-ticket items like major appliances (72%) and is especially low for TV and stereo equipment (55%).

Table 28

Percent of Past Week's Shoppers Who Buy
(for Selected Merchandise Categories)

	Number of Shoppers =100%	Percent Buying
Women's dresses	142	77%
Women's shoes, slippers	253	84
Women's tops, sweaters, blouses	202	92
Women's slacks, jeans, shorts	143	92
Men's pants, jeans	125	94
Men's shirts	114	96
Men's shoes, boots	78	94
Children's & infants' wear	238	97
Bedding and linens	120	87
Books, magazines	128	95
Records, tapes, videotapes	109	90
Stationery, gift items	243	94
Seeds, plants, shrubbery	240	96
Sporting goods	123	86
Small appliances	91	87
Furniture, furnishings	243	80
TV, stereo equipment	113	55
Major appliances	82	72
Average: all categories	-	87%

Base: Total shopping, Weeks I and II=100%

If most shoppers buy within a short period of time, a major question for retailers is, "How can I get them to buy in my store instead of my competitor's store?" The answer to this question obviously involves all aspects of retailing, including advertising, merchandise lines, pricing and sales training. The following sections describe the extent to which different kinds of stores succeed in converting shoppers to buyers.

Store-type Conversion Rates for Apparel

The ratio of buyers to shoppers for a particular category of merchandise and a given type of store might be described as a "conversion" rate. In this large national survey the number shopping in a particular store is too small to yield reliable data on conversion rates, but it is possible to compute rates for *types* of stores.[1]

Conversion rates for men's wear and women's wear show both similarities and differences. In both cases, specialty stores achieve identical rates (78%), the highest found for major store-type groupings. In both cases department stores rank third, and again the conversion rates are identical, at 69% (Table 29).

Table 29

Conversion Rates for Men's Wear and Women's Wear

	Men's Wear		Women's Wear	
	Base	Rate	Base	Rate
Department stores	(162)	69%	(537)	69%
Discount stores	(138)	58	(363)	74
National chain stores	(179)	74	(352)	61
Men's specialty stores	(224)	78	-	-
Women's specialty stores	-	-	(590)	78

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[1] Conversion rates for store types would be consistently higher than the rate for any single retailer in that store classification, because customers shopping for a single item in two or more department stores, discount stores, etc., will buy in only one of these.

Table 29 indicates that national chains and discount stores have differential rates of success among buyers of men's wear and women's wear. For women's wear, discount stores rank second, at 74%, and national chains rank fourth, at 61%, while figures for men's wear show the opposite pattern.

The importance of a store's ability to convert shoppers to buyers may go far beyond the effect this success rate has on today's sales figures. This is because the shopper-to-buyer conversion process signifies "success" for the customer as well as the store. For their future purchases customers are likely to favor those stores where their past success rate has been high.

Conversion Rates For Other Items

Conversion rates vary for different kinds of merchandise as well as different kinds of stores. Big-ticket items like furniture, TV and stereo tend to have lower conversion rates than less expensive merchandise like automotive supplies (Table 30).

Table 30

Conversion Rates for Selected Items

	Base: Total Items Shopped	Conversion Rate
Big-ticket items† in:		
Home furnishings & appliance stores	191	64%
Other specialty stores	130	68
National chain stores	148	52
Department stores	73	40
Automotive supplies in:		
Auto supply stores	222	89%

†Furniture, home furnishings and TV and stereo equipment.

Within the category of big-ticket merchandise, specialty stores achieve higher conversion rates than national chains do.

Do The Shopper's Characteristics Affect Conversion Rates?

It might be supposed that the ratio of buyers to shoppers varies with the shopper's characteristics, particularly if certain demographic segments tend to be more demanding or more impulsive. However, conversion rates vary more with the type of store than with the shopper's sex, age or education (Table 31).

Table 31

Shopper-to-Buyer Conversion Rates for Four Types of Stores

	Base: =100%	National Chain	Dep't Store	Disc. Store	Women's Spec.
Total shoppers	(2,824)	67%	75%	84%	80%
By Sex:					
Male	(1,095)	68%	72%	83%	*
Female	(1,722)	67	76	84	81%
By Age:					
18-34 years	(1,118)	65%	76%	84%	80%
35-54 years	(1,036)	68	76	83	84
55 or older	(640)	68	71	85	76
By Education:					
High school grad. or less	(1,761)	67%	77%	84%	83%
Some College or more	(1,317)	67	73	84	77

*Male shopper base too small for reliability.

This indicates that the store's merchandise line, sales personnel and pricing policies are the main factors affecting conversion rates. Some of the differences between stores may reflect the very nature of the store. For example, the fact that many discount stores carry national brand package goods at low prices may account for their high conversion rate. However, individual stores within a given type may have different conversion rates, and Table 31 suggests that any steps the retailer can take to improve conversion rates will apply to all of the store's shoppers, not merely to one demographic segment.

VI. ATTITUDES AND OTHER FACTORS THAT AFFECT SHOPPING AND BUYING

How Do Customers Choose a Store For Clothes Shopping?

Respondents completing the questionnaire were asked to choose from a list of six statements those which ranked first, second and third in their selection of a store for personal clothes shopping. Responses to this part of the questionnaire generally confirm the importance of "a good buy" and indicate that today's mobile customers often "shop around" before making a purchase.

The importance of price is indicated by the finding that a total of 50% choose the statement, "I usually go to a store advertising a good sale," while 43% agree with "I usually shop in several stores to get the best price" (Table 32). Mobility is also reflected in the finding that 50% "usually shop in several stores to find what I like best."

Table 32

Ranking of Statements on Choice of Store for Personal Clothes Shopping†

	Percent Ranking:			% Not
	First	Second	Third	Choosing
"I usually go to a store advertising a good sale."	19%	17%	14%	50%
"I usually shop in several stores to get the best price."	13	16	14	57
"I usually shop in several stores to find what I like best."	22	15	13	50
"I usually to go a store advertising clothes that appeal to me."	7	14	14	65
"I have one favorite store where I usually buy."	23	7	7	63
"I usually go to the closest store just because it's convenient."	3	3	5	89

Base: Total completing questionnaire=100% (2,705)

Question: When you are shopping for clothes for yourself, how do you usually go about choosing among the various stores available to you for that kind of clothing? (Please rank 1, 2, 3, in terms of what you are likely to do.)

†In addition to the six prelisted statements, respondents were given a space to write in any other reason for selecting a store, but only 6% of the total did so.

"I have one favorite store where I usually buy," is chosen by only 37%, but this is the number one reason for 23%. More than one third (35%) choose the statement, "I usually go to a store advertising clothes that appeal to me." In comparison, store location is unimportant; only 11% say, "I usually go to the closest store just because it's convenient."

Prices Matter Just As Much To High-Income Shoppers

Although high- and low-income shoppers may have different price ranges in mind for the same article of clothing, "a good buy" is equally important to both. "I usually go to a store advertising a good price," was chosen by 53% of those with incomes of $30,000 and over, as compared with 40% of those having incomes under $10,000 (Table 33).

Table 33

Importance of Price in Selecting a Store for Personal Clothes Shopping
(by Household Income)

	Total	$30,000 & Over	$20,000-$29,999	$10,000-$19,999	Under $10,000
"I usually go to a store advertising a good price."					
Percent choosing	50%	53%	55%	50%	40%
Percent not choosing	50	47	45	50	60
"I usually shop in several stores to get the best price."					
Percent choosing	43%	42%	45%	44%	41%
Percent not choosing	57	58	55	56	59
Base: Total completing questionnaire	(2,705)	(675)	(619)	(671)	(373)

Similarly, 43% of the highest income group and 41% of the lowest income group say, "I usually shop in several stores to get the best price." The amount saved by getting "the best price" may be offset by expenditures in time, effort and gasoline, but personal approaches to economics are not necessarily rational.

These findings are consistent with other research which indicates that the use of "cents-off" coupons is more common among high-income homemakers than among those with low incomes.[1] This may reflect the fact that adults with high incomes are better newspaper readers. Daily and Sunday newspapers are the main source for both cents-off coupons and information on retail sales.

Shoppers Like Newspaper Advertising

The self-administered questionnaire included a section that asked respondents to match two positive statements and two negative statements about advertising with five major media. The medium attracting the highest number of positive responses and the lowest number of negative responses was "newspaper ads."

More than eight out of ten (83%) agree that newspaper ads, "Make it easy to compare prices of different stores." In comparison, only 26% checked the medium ranking second on this statement (Table 34). Six out of ten (60%) match "I look forward to this kind of advertising" with newspaper ads.

On the negative side, only 3% match newspaper ads with the statement, "I try to avoid this kind of advertising," as compared with 37% for mail ads and 39% for television commercials.

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[1] For example, see "1982 Study of Media and Markets," Vol. P-11, Simmons Market Research Bureau.

Table 34

Statements Matched With Advertising in Five Media

	Percent Checking:				
	Newspaper Ads	Television Commercials	Magazine Ads	Radio Comm.	Mail Ads
Positive:					
"Makes it easy to compare prices of different stores."	83%	8%	8%	4%	26%
"I look forward to this kind of advertising."	60	7	20	6	28
Negative:					
"Repeats the same boring message over and over."	2%	78%	8%	46%	4%
"I try to avoid this kind of advertising."	3	39	16	24	37

Base: Total completing questionnaire=100%
(Unweighted base=2,705 adults)
(Rows total more than 100% because of multiple answers.)

Question: All of us see and hear a lot of advertising. Please match each statement below with the kind of advertising it best describes. (If a statement applies to more than one kind of advertising, circle accordingly.)

--And Shoppers Are Good Newspaper Readers

This survey i[illegible]onsistent with other current research indicating that 67% of all adults in the United States read one or more daily newspapers on the average weekday (or "yesterday"). Over five weekdays, 83% report reading on one or more days. The percentage reading is considerably higher among the well educated and those with higher household incomes (See Appendix Table 9 for details.)

Among customers and potential customers for all kinds of retail stores, newspaper readership tends to be somewhat higher than among the total adult population, because those shopping in any given week are somewhat upscale in comparison to the total population. On an average weekday, 72% of all department store and national chain store customers read a daily paper (Table 35).

Table 35

Percent of Shoppers Reading Daily Newspaper Yesterday
(by Type of Store)

	Base: Total Shoppers	Percent
Department store	(742)	72%
Discount store	(1,034)	68
National chain store	(803)	72
Men's specialty store	(162)	75
Women's specialty store	(442)	68
Miscellaneous apparel store	(107)	76
Shoe store	(277)	68
Miscellaneous specialty store	(913)	72
Building and hardware store	(379)	70
Nursery, plant store	(289)	77
Home furnishings, appliances	(182)	73
Drugstore*	(153)	67
Auto supply store	(197)	74
Average for 13 store types	-	72%

*Drugstore figure refers to those shopping for general merchandise. The questionnaire specifically excluded shopping for "groceries, drugs or toiletries."

Shoppers Tend to Believe That "Most Stores Carry the Same Brand Names and Styles"

The general lack of customer loyalty to any one store suggests that shoppers sometimes find it difficult to see any real differences between competitive stores. To shed some light on this subject, the self-administered questionnaire asked respondents to indicate whether their own clothes shopping led them to believe that most department stores carry the same or different brand names and styles.

Half (51%) of those completing the questionnaire choose the statement, "Most department stores carry the same brand names and styles." Younger adults are especially likely to believe that this is true. Two thirds of those under 25 (68%) associate competing department stores with the same brand names and styles, as compared with only 28% of those who are 65 or older (Table 36). Household income groups show a similar pattern; 58% of those with incomes of $30,000 and over associate different stores with the same clothing lines, but only 38% of those with incomes under $10,000 do so.

Offering popular designer labels may be essential for today's retailers but it probably reduces the level of store loyalty.

Table 36

Whether Most Department Stores Carry the Same or Different Brand Names and Styles

(by Demographics)

	Base: =100%	Same	Different
Total respondents	2,705	51%	46%
By Sex:			
Male	1,086	50%	46%
Female	1,612	51	45
By Age:			
18-24 years	290	68%	30%
25-34 years	686	59	38
35-44 years	561	57	42
45-54 years	420	49	50
55-64 years	376	45	50
65 or older	359	28	62
By Education:			
Some high school or less	427	39%	54%
High school grad.	1,023	51	46
Some college	596	56	42
College graduate	637	55	42
By Household Income:			
$30,000 and over	675	58%	41%
$20,000-$29,999	619	56	41
$10,000-$19,999	671	50	47
Under $10,000	373	38	54

Base: Total completing questionnaire=100%
(Rows do not total 100% because "no answers" have been excluded.)

Question: So far as your most recent clothes shopping experiences go, which of the following statements is closer to the truth?

Most department stores carry the same brand names and styles, or

Most department stores carry different brand names and styles.

--But The Store's Reputation Still Matters

On a related issue, 40% of those completing the questionnaire agree that "Branded label merchandise gives me better quality and value," while 57% say that "If the store is reliable, it makes no difference whose brand is on the merchandise" (Table 37). Responses to this question show relatively small differences among demographic segments, except that men may attach somewhat more importance to branded labels (45%, versus 35% for women).

Responses to the questions on similarities in merchandise lines and reliance on branded labels suggest that in some cases heavy advertising by manufacturers can blur the identities of individual stores. On the other hand, it might be possible for a store to project a more distinctive identity by promoting private labels more aggressively. Obviously this would have to be a long-range goal, and advertising alone cannot do the job--the style, quality and pricing of the merchandise would be equally important.

Table 37

Attitudes Toward Branded Labels Versus Store's Reputation
(by Demographics)

	Base: =100%	Branded Labels Better	No Difference
Total respondents	2,705	40%	57%
By Sex:			
Male	1,086	45%	53%
Female	1,612	35	61
By Age:			
18-24 years	290	39%	59%
25-34 years	686	38	59
35-44 years	561	41	57
45-54 years	420	38	61
55-64 years	376	43	54
65 or older	359	39	54
By Education:			
Some high school or less	427	37%	58%
High school grad.	1,023	40	58
Some college	596	39	59
College graduate	637	42	56
By Household Income:			
$30,000 and over	675	44%	54%
$20,000-$29,999	619	40	57
$10,000-$19,999	671	37	61
Under $10,000	373	34	59

Base: Total completing questionnaire=100%
(Rows do not total 100% because "no answers" have been excluded.)

Question: And which of these statements would you say is closer to the truth in terms of your most recent clothes shopping experiences?

Branded label merchandise gives me better quality and value, or

If the store is reliable, it makes no difference whose brand is on the merchandise.

Appendix

Appendix Table 1

1981 Personal Consumption Expenditures†

	U.S. Total (millions $)	Per Average Household
Total for all goods	$962,645	$11,648
Durables	$234,552	$2,848
Jewelry, watches	12,915	157
Furniture	19,802	240
Kitchen and household appl.	19,253	234
China, glassware, utensils and tableware	9,673	117
Other durable furnishings	20,739	252
Ophthalmic and orthopedic devices	4,999	61
New cars	49,244	598
Purchase of used cars (net)	17,965	218
Other motor vehicles	10,349	126
Tires and parts	21,003	255
Books and maps	7,630	93
Wheel goods, boats, sports equip.	17,074	207
Radio and TV receivers	23,906	290
Non-durables	$728,093	$8,840
Food for off-premises	241,838	2,936
Alcoholic bev. for off-prem.	28,826	350
Purchased meals and beverages	80,528	978
Other alcoholic beverages	17,388	211
Tobacco products	23,129	281
Clothing and accessories	$114,449	$1,389
Shoes, footwear	19,095	232
Women's, children's clothing	62,697	761
Men's, boys' clothing	32,657	396
Toilet articles and preparations	16,116	196
Semi-durable HH furnishings	10,579	128
Cleaning products, HH supplies	21,372	259
Stationery and writing supplies	6,368	77
Drug preparations, sundries	18,647	226
Fuel oil and coal	19,748	240
Gasoline and oil	96,783	1,175
Magazines, newspapers, music	9,364	114
Toys and sports supplies	15,678	190
Flowers, seeds, plants	4,999	61
Expenditures abroad by U S. residents	2,281	28

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†Source: Survey of Current Business, U.S. Department of Commerce/Bureau of Economic Analysis, July 1982. Table shown here is limited to those categories representing purchased retail goods and services.

Appendix Table 1 (cont.)

1981 Personal Consumption Expenditures (cont.)

	U.S. Total (millions $)	Per Average Household
Total for services[‡]	**$533,371**	**$6,475**
Cleaning, storage, repair of clothing	6,382	77
Watch repair, clothing rental, etc.	2,561	31
Barber, beauty shop, health club	8,460	103
Telephone and telegraph	31,149	378
Electricity	45,232	549
Gas	21,538	261
Water and other sanitary services	10,007	121
Domestic services	7,037	85
Other household services	13,955	169
Physicians	50,404	612
Dentists	17,077	207
Other professional services	6,369	77
Private hospitals and sanitariums	84,084	1,021
Health insurance	13,000	158
Bank service charges	6,826	83
Brokerage charges, etc.	6,703	81
Legal services	15,655	190
Funeral and burial expenses	4,689	57
Other personal business	7,165	87
Car repair, greasing, storage	35,172	426
Bridge, tunnel, road tolls	888	11
Purchased local transportation	6,813	83
Insurance premiums, less claims	9,121	111
Railways, intercity	520	6
Bus, intercity	1,138	14
Airline	10,885	132
Other travel expenses	937	11
Radio and TV repair	3,676	45
Movie admissions	2,751	33
Legitimate theater, opera, etc.	1,658	20
Spectator sports	2,453	30
Clubs and fraternal organizations	2,480	30
Participant amusements	6,431	78
Parimutual receipts	1,920	23
Other entertainment services	17,203	209
Higher education	11,888	144
Private elementary and secondary schools	9,470	115
Other courses, training	7,932	96
Religious and welfare activities	25,398	308
Foreign travel by U.S. residents	16,389	199

[‡] Services total does not include housing ($295,300 million, or $3,573 per average household).

Appendix Table 2

1981 Estimates of Income, Expenditures and Savings

	U.S. Total (millions $)	Per Average Household	% of Disposable Income
Gross income	$2,415,844	$29,330	-
Less taxes and payments	386,696	4,665	-
Disposable income[†]	$2,029,148	$24,635	100.0%
Expenditures for goods	962,645	11,648	47.3
Expenditures for services	533,371	6,475	26.3
Housing costs	295,300	3,573	14.5
Savings	130,209	1,580	6.4

Source: Department of Commerce, Survey of Current Business, July 1982.

[†] Note that total of expenditures and savings is not equal to amount shown for disposable income. This is because summary figures have been adjusted by the Department of Commerce, but detailed expenditure figures are not adjusted. Also, the Department of Commerce assigns dollar values to classifications such as "services furnished without payment by financial intermediaries" and "expenditures in the U.S. by foreigners". Together, adjustments and excluded classifications amount to 5.5% of the disposable income figure shown.

Appendix Table 3

Percent of Households Buying Apparel in One Month's Time

	Overall Average	Jun-Mar Average	Apr-Jun Average	Jul-Sep Average	Oct-Dec Average
Women's apparel	40.0%	38.5%	41.7%	39.3%	40.3%
Men's apparel	24.2%	21.1	24.0	22.0	29.9
Girls' apparel	13.3%	11.6	12.6	14.1	15.0
Boys' apparel	14.0%	11.9	12.7	15.4	16.2

Source: National Purchase Diary, 1981.

Appendix Table 4

Major Purchases ($300 +) in Past Six Months

	Total	Males	Females
Made major purchase	54%	57%	41%
No major purchase	45	42	47
No answer	1	1	2
Total completing questionnaire=100%	(2,705)	(1,086)	(1,612)

Incidence by type of merchandise:

Automobile (12%); major appliance (11%); furniture (11%); automobile repairs (9%); stereo or TV equipment (10%); carpeting or rugs (5%); women's clothing (5%); men's clothing (5%); fine jewelry or watch (5%); power tools, equipment (3%); recreational or sporting goods (2%); children's clothing (2%); personal computer (1%); camera (1%); other (10%).

Question: Within the past six months or so, have you bought anything you would consider a major purchase--somtheing that cost you $300 or more? What kind of purchase was this? (Please circle as many as apply.)

Appendix Table 5

Flea Market Shopping in Past Three Months

	Total	Males	Females
Shopped in flea market	19%	18%	19%
Did not shop in flea market	76	77	76
Not aware of any flea market	4	4	4
No answer	1	1	1
Total completing questionnaire=100%	(2,705)	(1,086)	(1,612)

Appendix Table 6

Types Of Stores Shopped In
(by Age)

	18-34 years	35-54 years	55 yrs. & Older
Department store	24%	24%	23%
Discount store	35	32	32
National chain store	27	28	23
Men's specialty store	5	5	5
Women's specialty store	15	14	12
Miscellaneous apparel store	5	4	1
Miscellaneous specialty store	33	31	23
Building and hardware store	12	13	13
Nursery, plant store	8	11	10
Home furnishings, appliances	5	6	6
Shoe store	10	10	6
Variety store	4	2	4
Drugstore*	5	4	5
Auto supply store	8	7	4
Auto dealer	4	3	2
Factory outlet, warehouse store	2	3	3
Supermarket*	2	2	2
Mail and Phone order (net)	3	3	3
All other	8	10	7
Don't know, not sure	5	5	6
No answer	15	18	14
Unweighted base: Total shoppers=100%	(1,118)	(1,036)	(640)

*Respondents were asked to exclude shopping for "groceries, drugs or toiletries," so drugstore and supermarket figures refer to general merchandise shopping only.

Appendix Table 7

Types Of Stores Shopped In
(by Education)

	Some High School or Less	High School Graduate	Some College	College Graduate
Department store	16%	23%	26%	28%
Discount store	40	37	31	26
National chain store	28	27	25	24
Men's specialty	4	4	6	7
Women's specialty store	11	14	17	15
Miscellaneous apparel store	1	4	3	4
Shoe store	9	9	10	8
Miscellaneous specialty store	18	26	35	38
Building and hardware store	10	11	15	13
Nursery, plant store	7	8	10	12
Home furnishings, appliances	5	6	7	5
Auto supply store	7	6	8	6
Auto dealer	2	3	5	3
Variety store	4	4	3	2
Factory outlet, warehouse store	3	3	3	2
Drugstore*	2	4	5	8
Supermarket*	2	1	3	2
Mail and phone order (net)	1	3	3	3
All other	6	8	10	9
Don't know, not sure	6	4	4	6
No answer	13	16	17	17
Unweighted base: Total shoppers=100%	(567)	(1,194)	(636)	(681)

*Respondents were asked to exclude shopping for "groceries, drugs or toiletries." Therefore, percents shopping in drugstores and supermarkets refer to general merchandise shopping only.

Appendix Table 8

Kinds of Merchandise Ordered by Mail or Phone in Past Seven Days

	Mail	Phone
One or more items (net)	16%	10%
Women's clothing	5%	3%
Books	4	1
Records, tape cassettes	3	1
Plants, nursery products	2	1
Men's clothing	2	1
Coins, stamps, collectibles	1	*
Appliances	1	1
Sheets, towels, bedspreads	1	1
Children's clothing	1	1
Jewelry, watches	1	*
Tools	*	*
All other items	4	4

Base: Total completing questionnaire=100% (2,705)

Question: What kinds of things did you order? (Circle as many as apply.)

Appendix Table 9

Daily and Sunday Newspaper Data
(by Demographics)

	Daily Newspaper: Read Past Week	Daily Newspaper: Read Yesterday	Daily Newspaper: Have Home Del.	Read Past Sunday
Total adults	83%	67%	59%	65%
By Sex:				
Males	86%	69%	60%	67%
Females	81	65	59	63
By Age:				
18-24 years	80%	60%	52%	60%
25-34 years	79	59	48	61
35-44 years	86	69	62	66
45-54 years	87	74	71	73
55-64 years	85	72	65	70
65 or older	81	69	63	64
By Education:				
Some high school or less	71%	53%	51%	46%
High school graduate	81	65	58	64
Some college	88	74	62	70
College graduate	90	76	66	79
By Household Income:				
$30,000 & over	91%	77%	72%	78%
$20,000-$29,999	85	67	59	70
$10,000-$19,999	80	63	55	59
Under $10,000	76	59	48	54

Base: Total respondents, first telephone interview=100% (4,005)
(See Appendix for bases.)

Appendix Table 10

Usual Handling of Stuffers in Credit Card Statements

	Total	Males	Females
Read them carefully	7%	4%	8%
Scan them quickly to see if I'm interested	67	64	70
Throw them away without really looking at them	23	28	19
Don't recall getting any ads like this	2	3	2
No answer	1	1	1
Total owning one or more credit cards=100%	(2,020)	(826)	(1,189)

Question: When bills are mailed to charge customers, small ads are often included for several different products. What do you usually do with ads of this type?

METHODOLOGICAL NOTE

The following tables are provided for the reader who is interested in obtaining a quick estimate either of the stability of a given percentage or of the significance of the difference between two percentages.

Confidence Intervals for a Given Percentage
(at the 95% confidence level)

N	Reported Percentage				
(Base for %)	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	2.6	3.5	4.0	4.3	4.4
250	3.7	5.0	5.7	6.1	6.2
200	4.2	5.5	6.3	6.8	6.9
150	4.8	6.4	7.3	7.8	8.0
100	5.9	7.8	9.0	9.6	9.8
50	8.3	11.1	12.7	11.6	13.9
25	11.8	15.7	18.0	19.2	19.6

Example: If a report shows that 20% of all respondents (when N = 500) answer in a particular way, the chances are about 95 out of 100 that the true value is 20% + or - 3.5%, that is, that the range 23.5% - 16.5% contains the true value.

Significance of Differences Between Percentages
(95% confidence level)

Average of the Bases of Percentages Being Compared	Average of Reported Percentages				
	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	3.7	4.9	5.7	6.1	6.2
250	5.2	7.1	8.1	8.6	8.8
200	5.9	7.8	8.9	9.6	9.8
150	6.8	9.1	10.3	11.0	11.3
100	8.3	11.0	12.7	13.6	13.9
50	11.7	15.7	18.0	19.2	19.7
25	16.7	22.2	25.5	27.2	27.7

Example: A report shows that 33% of all respondents from 30 to 39 years of age use a certain product and that only 27% of all respondents in the 40-to-49 age group use that product. Could this difference be due to chance?

In this example assume an average base of 500 for the represented percentages. The average of the percentages (33 + 27) equals 30% and the difference between the percentages is 6%.

Since 6% is greater than 5.7 (the figure in the table for this base and percentage) the chances are about 95 out of 100 that the product is used more by the 30-39 age group.

The table values are based on an assumption of simple random sampling. The figures may be too large if a stratified sampling technique was used and probably are too small if a cluster sampling technique was utilized. (For formulas used, see McNemar, Psychological Statistics, pages 54, 60.) The second table should be used with extreme caution if the bases being averaged are very different.